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ABSTRACT

A manual outlining a training program for study organizers who are either advising workers already pursuing further education or seeking to reach those workers not yet aware of career and educational opportunities is presented. The guide is designed to aid institutions looking for new ways to involve their workers in educational opportunities and to meet the lifelong learning needs of the work force. Worker refers to industrial workers, building-trades workers, and service and professional workers. Study organizers provide outreach services and meet with workers to inform them about available career and educational programs, help them complete admissions and tuition refund applications, and assist them in solving personal, family, work, or financial problems relating to their career and educational plans. Information is presented on selecting the trainer and support workers, selecting the study organizers, and setting up a training program. Eleven training objectives are detailed in terms of learner outcomes, number of sessions, teaching methods, activities, suggestions for the trainer, and references. The curriculum guide should be reviewed by the trainer and the labor education advisory committee and adapted to meet local conditions. (SW)

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Linking the Worker to Postsecondary Education

A Manual for Training Study Organizers in America

Harvey B. Schmelter

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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COLLEGE ENTRANCE EXAMINATION BOARD
NEW YORK
1980

Future Directions for a Learning Society

The College Board

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This project was funded by the Office of Career Education, United States Office of Education, with partial support from the Exxon Education Foundation.

WHAT IS FDLS?

The Future Directions for a Learning Society (FDLS) program is a major effort toward the realization of a learning society in the United States. The program focuses on improving access and transition for learners, which has been the Board's role in education for more than 75 years. By building on recent Board programs that have increasingly focused on adults, the program extends its historic role to include assistance to adult learners and to the diverse agencies, institutions, and organizations that provide learning opportunities for them.

Funded by the Exxon Education Foundation, FDLS develops consensus and support for strategies, services, and policies that can best meet current and projected needs of participants and providers in a learning society. To this end, the program solicits and relies on the participation of professional people in the field, public policymakers, and the larger community. A major purpose of the Exxon grant is to promote the mobilization of additional funds and other resources necessary for major initiatives in this developing field. The initial support covers the project's planning and management, the identification and design of service areas, the review and analysis of public policy, and publishing relevant materials.

The program will produce projections of future trends, information about the needs of learners and providers of educational opportunities and resources, policy recommendations, and services.

The program is engaged in finding better ways to gauge the needs of learners, in identifying the problems institutions face in meeting learners' needs, in strengthening learning opportunities, and in increasing public, professional, and political understanding of the field. A chief focus of the program is to demonstrate promising new approaches and specific services.

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FOREWORD

Working is like learning. When asked if they engaged in learning something new in the last 12 months, most people will say yes. The same would most certainly be true if we asked everyone in the nation if they had done some work in the last 12 months. Work, like learning, is an integral part of life; it is small wonder that people talk so much about the link between the two. But there is still a lot more talk than action.

People who have tried to link the two have not found the job easy. We certainly didn't. While this manual deals with only a relatively narrow area, its focus is important since it singles out the blue collar worker. The effort is to attract more workers into the joys and pleasures of continuing education and lifelong learning. We aren't sure about the extent of our success. What we are sure of, however, is that, without our efforts and others in the future, there probably will be a widening gap in the chain that links education and work--at least for the blue collar workers, who constitute about 25 percent of the work force.

Some recent developments are focusing increased attention on the link between education and the worker. The educational level of the work force has risen sharply: in the last 10 years, the number of workers with at least one year of college has increased from 25 percent to 33 percent. Even more significant is the fact that the percentage of college-educated blue collar workers has more than doubled since 1970. Men (38 percent) still lead the women (34 percent) in having at least one year of college, but this gap is also closing rapidly.

Another matter is that leaders of the labor movement in the United States are increasingly anxious for the so-called "rank and file" to raise their educational sights. In speaking to the American Council on Education, Sol Chaikin, president of the International Ladies' Garment Workers Union, asked for the "continuing education of the people so that they may intelligently examine what is happening, express their judgment, and exercise their proper influence in the affairs of their community and nation. Chaikin even suggested that there were attractive rewards in serving the blue collar worker. He went on to say:

> Workers represent a large body of potential college enrollees. With an appropriate restructuring within higher education, worker students could replenish the ranks which have been depleted since the end of the so-called baby boom.

I am not suggesting the elimination of the traditional pattern of education for the full-time student. Rather I am urging you to be cognizant that the financial pressures confronting higher education also are compelling changes within the labor force.

A decline in the real standard of living is forcing young people to enter the work force at an earlier age than was typical a few years ago. The inflation, which plagues us all, makes it nearly impossible for workers to leave their workplace for the purpose of becoming full-time students.

At the same time, however, the incentives to provide higher education for workers are more compelling than ever before. Current technological changes and future improvements necessitate educational programs which will train young workers and retrain older workers in these newly required job skills.

The nature of many of these job skills will be sophisticated. Therefore, the training for such sophisticated job skills should necessarily be undertaken at the college and university level.

The result will be a more productive and more employable labor force. There would be societal benefits as well. The upgrading of aggregate skill levels in the labor force would result in a general rise in the real standard of living. Greater availability of higher education for workers would also increase the opportunities for upward mobility, and diminish tendencies toward social stratification. Most importantly, closer collaboration between workers and higher education offers real promise for discovering the solutions to some of our most critical current problems.

In the limited experience we have had in linking the worker and education, I have concluded personally that there is a certain amount of unconscious discrimination against the blue collar worker in our present system of continuing, lifelong education. It involves restrictions on benefit utilization, pertinence of program offerings, program locations, and many other factors. Things need to be done either to eliminate these unconscious prejudices or to circumvent them. The study-organizer project is more the latter than the former.

This experience has convinced us at the College Board that there are some long-overdue steps which can be taken to help this particular group of underserved Americans into the mainstream of lifelong education. For example:

- There needs to be a lot more effort put into developing protocols for the evaluation and assessment or prior learning for those who have held leadership positions in the trade union movement.
- Labor studies need to be expanded. While some 150 institutions now offer programs, not enough of these are at the degree level nor are the programs "deep" enough in their fields. Three to four times as many institutions should be involved; possibly one or more of the developing television universities should consider this possibility.
- A series of external exams (for example, CLEP) needs to be developed in labor studies areas. A minimum of five to seven areas might be covered.

- With the use of external exams, it would be possible to offer at least an external associate degree through the examination process. In this way, rather than being offered a "terminal degree," people would be urged to take the next step and obtain a bachelor's degree.
- Study-organizer projects need to be expanded. These will work best if they are a joint venture of management, labor, and the local providers. The College Board desires to put its knowledge in this area to work in communitites where the interested parties want to see something happen. Without this willingness on the part of all parties, little can be done.
- Colleges and labor organizations can and should work together directly. This is not to exclude the interests of management, but the union and the college together can do a great deal for the blue collar worker.
- There should be an all-out effort to evaluate the training programs offered by organized labor to see if many of these warrant the same kind of recognition provided to management-level programs offered by American business.

The likely economic disjuncture of the next few years will probably affect most of the members of organized labor. It is estimated that 1.2 to 1.5 million people in the auto industry and related areas may be on permanent furlough. A recession of any duration will exascerbate this problem in a number of industrial areas. Some believe this is all part of the national conversion from an industrial economy to a service economy, and it may well be. But if the conversion comes too fast, the disjunctures will be serious.

Lifelong education offers one way of helping people move from one status to another with a minimum of stress. More attention needs to be given to the unique lifelong learning needs of organized labor. We hope this project and this manual may serve to alert our educational leaders and policymakers to both the genuine need for action and the unique opportunities for service.

Rexford G. Moon, Jr.

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Harvey B. Schmelter

INTRODUCTION

The participation of adults in continuing and recurrent education, as well as in "lifelong learning" opportunities in general, has dramatically increased during the last 10 years. In 1975 there were 17 million adults engaged in adult education on a part-time basis. This was a 31 percent increase from the 1969 figures. Fifty-five percent of these adults were pursuing occupational training in order to maintain, improve, or change their relationship to their work, according to a survey by John R. Valley of the Educational Testing Service.

Further evidence that adults are seeking education as a means of advancing in their work comes from the data collected in 1978 by the College Board in a national survey. The Board reported that nearly 40 million Americans were in a state of career transition. More significant, more than 60 percent of these Americans said they planned to seek additional education or training to help them achieve career advancement and self-fulfillment goals. Rapid changes in some fields have made old skills obsolete. It is conceivable that some workers could find it necessary to develop new skills as often as every 10 years.

In the decade ahead, adults are going to become an increasingly important component of the career education movement. Consider the following statistics cited by Valley:

> In 1970, the total population of the United States was 205 million. Of this total, 62 million were children under 16 and 143 million were adults 16 and over. By the year 2000, children will decrease to 50 million and adults will increase to 195 million. In other words, the potential pool for career education of adults will be about four times that of children by the end of this century.

What implications does this trend have for postsecondary educational institutions in the United States? As Kenneth Hoyt points out:

> American education cannot be said to have adequately met the goal of education as preparation for work if its efforts are limited to preparing school leavers only to make the transition from school to work. In addition, persons must be prepared to make the transition from work to school and, even more important, to combine school with work during various portions of their adult lives.

Postsecondary institutions need to reevaluate their priorities and extend their programs and delivery methods to meet the demands of adult workers. This training manual was developed from a demonstration project intended to aid

institutions seeking new ways to involve workers in educational opportunities. In this project postsecondary and union educators trained workers as "study organizers" to assist their co-workers in gaining greater access to educational opportunities and thus utilizing their tuition refund program more effectively. Although this resulting manual is designed primarily to serve as a guide in training study organizers, it also may provide educational insitutions with new ideas for reaching adult workers.

THE NEED TO INCREASE WORKER PARTICIPATION IN EDUCATION

Future Directions for a Learning Society (FDLS) is a program of the College Board, funded by the Exxon Education Foundation to study the educational needs of adults and to develop and distribute materials that assist adult learners and the institutions serving them. Information provided by national surveys indicating that the number of workers participating in lifelong learning activities has been significantly less than other segments of our adult population prompted FDLS staff to identify and seek ways to assist workers in gaining greater access to education. These concerns were also those of the International Union, United Automobile, Aerospace, and Agricultural Implement Workers of America--UAW.

The UAW has had a negotiated Tuition Refund Program for its members since 1964. Currently, under approximately 1,650 UAW contracts, more than 85 percent of the UAW membership is covered by this career-oriented Tuition Refund Program. In negotiating the initial Tuition Refund Program in 1964, it was assumed that there would be few, if any, problems in enrolling UAW members; that they would naturally become aware of the program and enroll in significant numbers to make it an immediate success. However, surveys by the UAW Education Department have revealed that only a small percentage of UAW members are taking advantage of tuition refund.

The same is true of other industrial workers. Although about 90 percent of the industrial companies today have tuition reimbursement programs, the average utilizaton rate is about 4 to 5 percent, according to a National Manpower Institute study of selected companies. An early conclusion of that study is that a barrier to participation in recurrent education for industrial workers is a lack of information about educational opportunities and tuition refund benefits.

This finding is supported by a more recent study by David R. Chudy of UAW members at a General Motors plant in western New York:

> The data obtained from the workers' responses suggest that there does indeed exist a number of problems which deter or prevent worker participation in the two unions' Tuition Refund Programs. These problems generally involve a lack of information, counseling, company and union encouragement, money, and time regarding utilization of the benefits.

However, Chudy went on to state:

> Interest in the Tuition Refund Program is quite high. Further, we suggest that if the problems associated with the program could be removed, interest and utilization would increase still more. The workers identified a wide variety of courses and programs they would like to take, and indicated their preference to take these courses at a four-year or community college. In short, the data suggest a need for the program as well as the need to improve it.

As a leader in union educational activities, the UAW wanted to find new ways to increase worker utilization of the Tuition Refund Program. The UAW Education Department approached the FDLS program at the College Board to determine how both organizations could combine their expertise in a joint effort to increase worker participation in education. The term "worker" refers to a broad grouping of workers in America: industrial workers in the private sector, building-trades workers, service and professional workers, public-sector workers, and educators in the total educational system.

THE STUDY-ORGANIZER CONCEPT

With funding from the Office of Career Education of the United States Office of Education, FDLS and the UAW Education Department developed a study-organizer program based on a concept that originated in Sweden. There legislation provides for workers to be trained as study organizers to increase co-worker involvement in adult education activities. They are given release time and are permitted to meet with workers at the work site. Currently, there are more than 20,000 study organizers in Sweden, which has a total population of more than eight million.

The FDLS-UAW program differs from the Swedish model in that the study organizers work at a center located near the plant. Another difference is that in this country, since no legislation exists regarding study organizers, it will be necessary for one or more organizations to assume the responsibility for initiating and maintaining the programs. This sponsor might be a post-secondary educational institution, a labor union, and/or any other group interested in increasing work access to education.

The sponsor should establish a study-organizer center that would be easily accessible to workers. As determined by local conditions, the center may be in a union hall, at an educational institution, in a community building, or at the plant site. The center itself could be an office, a conference room, an open-space area, a trailer, or part of an existing career center at an educational institution. After completing a training program, the study organizers would be responsible for running the center with minimal supervision. However, there should be someone designated by the sponsor to oversee the operation of the center and provide any needed resources and technical assistance to the study organizers.

There are two major functions of the study organizers. One is to serve as a resource person and adviser for workers who are interested in pursuing further education. The study organizers meet with workers in the center at scheduled times to inform them about available career and educational programs, help them complete admissions applications and tuition refund applications, and assist them in solving personal, family, work, or financial problems relating to their career and educational plans. When necessary, workers may be referred to specific contacts at postsecondary institutions. The other ongoing activity of the study organizers is developing ways to reach workers who may not be aware of career and educational opportunities and draw them to the center. This outreach effort is as important as the advising function. The study organizers may be volunteers, but it would be more effective to pay them or see if the company would provide release time for them.

Although the term "study organizer" is used in this manual, other possible titles for workers trained to assist their co-workers in participating in education programs include the following:

Tuition refund advisers
Work-study advisers
Work-study counselors
Work-education advisory committeeperson
Education committee counselor
Local union education committee counselor
Education counselor
Adult education adviser
Work-education adviser
Worker education counselor
Educational broker
Educational steward

THE IMPORTANCE OF COOPERATION

The effectiveness of each study-organizer program will depend in large part on the degree of cooperation among unions, companies, educational institutions, and community organizations. To ensure success, all these groups should be supportive of the program in their attitudes and activities.

It is important that the officers of the union local have a high regard for the opportunity afforded workers to pursue education through the tuition refund benefit and encourage members to take advantage of this. The study-organizer program should be thoroughly integrated into ongoing union activities.

The company management, especially the personnel department, must recognize the upward mobility (with no limits) of workers who pursue education; otherwise much of the motivation for such efforts is eliminated. Supervisory personnel should try to accommodate worker-students when scheduling shifts or at the very least avoid hindering their efforts.

Administrators, staff, and teachers at local postsecondary educational institutions must regard the worker-students as an important part of their clientele. Regulations, schedules, courses, facilities, and counseling and teaching methods should be reviewed and adapted to meet the needs of these adult students. A close working relationship should be developed with the study organizers.

The supportive role of community organizations in the study-organizer program may vary greatly. Perhaps it is sufficient to point out that unions historically have been community oriented. Union members are workers, family men and women, taxpayers, and citizens. Workers' interests in education and in community progress go hand in hand.

THE LABOR EDUCATION ADVISORY COMMITTEE

To serve as a vehicle to channel the support and resources of unions, educational institutions, companies, and community organizations into the study-organizer program, the sponsor should establish a labor education advisory committee. It will be important to consult with union officers at the state and local levels and union educators in selecting members for the advisory committee. Although the committee is advisory, a direct working relationship should be established with those who will implement this program.

Especially in the critical beginning stages, the committee will meet frequently to advise the sponsor on organizing the training program to meet local conditions. As the program gets under way, the following are recommended tasks to be undertaken by the advisory committee:

- Assist in the process of selecting a trainer
- Provide advice on adapting the training program curriculum to meet local conditions
- Identify study-organizer candidates and advise in the final selection
- Assist in the training program
- Advise on identifying the site for the study-organizer center and setting it up
- Review the progress of the training program and later the operation of the study-organizer center

In general, the labor education advisory committee will serve to promote the ongoing interchange of ideas necessary for a successful study-organizer program.

IMPLEMENTING THE TRAINING PROGRAM

After establishing a labor education advisory committee, the next task for the sponsor is the selection of the individual who will have primary responsibility for training the potential study organizers. This trainer will fill a key role in the entire program, and the information presented under the heading "Selecting the Trainer" in the next section of this manual is intended to provide guidance in choosing the right person for the position. The labor education advisory committee will be helpful in interviewing applicants and making recommendations for the final selection.

The first task of the trainer will be to review the curriculum guide presented in the final section ("Training Objectives") of this manual and decide how it should be adapted to meet local conditions. Members of the labor education advisory committee should participate in this review. Once a decision has been made as to curriculum, the trainer, in consultation with the advisory committee, can determine which other individuals with special areas of expertise will be needed to assist in the training program. These will most likely come from unions, postsecondary educational institutions, companies, and community organizations. Criteria for their selection is provided in the next section of the manual under the heading "Determining the Assistants."

Again in consultation with the labor education advisory committee, the trainer should initiate the process of choosing the potential study organizers. The section of this manual entitled "Selecting the Study Organizers" provides information on obtaining applicants and making a final choice of trainees.

Guidance for the trainer in undertaking the additional tasks involved in getting the training underway is provided in the section, "Setting Up a Training Program." These tasks include selecting and developing the teaching materials, scheduling the classes, and choosing the training facility. Suggestions to the trainer are also provided in that section on creating the most conducive atmosphere for learning and providing for evaluation and follow-up.

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WHO SHOULD DO THE TRAINING?

SELECTING THE TRAINER

A very important decision for the sponsor establishing a study-organizer program is the choice of a trainer. As discussed in the Introduction, this person will have primary responsibility for selecting and training workers as study organizers. The sponsor should consult with the labor education advisory committee in reviewing applicants for the position of trainer and choosing the best candidate. Careful consideration should be given to the appropriate training, experience, skills, and personal characteristics outlined in the following discussion.

Training and Experience

The trainer should be someone with the educational experience to become knowledgeable about the subject matter of the training program: the job, wage, classification, transfer, promotion, and contractural procedures of the workplace involved; the details of the particular tuition refund program; the mechanics of the enrollment procedures for the workers at the postsecondary institutions involved in this program; and the range of course selections of the postsecondary institutions. He or she will also have to be familiar with union officials (including the local officers, the regional education representative, and possibly the regional servicing representative), the management in the personnel department of the companies involved, the key members of postsecondary institutions' faculty and administration, and community resource personnel.

The experience of the trainer should include teaching adults. Someone who undertakes this kind of assignment without having taught adults previously may discover insurmountable barriers to effective communication if traditional teaching practices are followed. It is essential for the trainer to be able to utilize adult education methods in training the study organizers. In the UAW's experience with past Labor Studies Programs, the teachers have noted that their classroom experience is best characterized by "learning from each other," an experience not likely to be indicative of an instructor in a traditional teacher-student situation.

The trainer also should have experience in counseling adults. Adult workers-as-students need a different kind of counseling than is most effective with the so-called traditional student. Since an important part of the training program will be instructing the study organizers in how to counsel workers, a trainer should be experienced in both directive and nondirective counseling, and know when to use each type with adults.

Skills

Communication skills. Face-to-face discussion, group discussion, listening, explaining, asking questions, reviewing materials, offering advice, seeking background information about each individual relevant to the purpose of the meeting, and being able to relate to people on an individual basis are some of the major skills of communicating that the trainer will be expected to use effectively. The trainer should have had sufficient experience in working with adults in general and workers in particular to be able to communicate effectively with them at the workplace. Each new activity is certain to provide new knowledge, insights, and skills in communicating for the trainer, and the kind of skills required in this particular project are certain to increase.

Organization skills. Since the trainer will have primary responsibility for putting the training program together, he or she will have to be able to organize a number of activities involving people from unions, educational institutions, companies, and community organizations. The trainer will also have to organize the extensive materials required for the training program and later the study-organizer center.

Problem-solving skills. For the trainer these skills lie in being able to get the study organizers to utilize present knowledge and past experience to solve individual problems in specific ways. For example, the astute plant floor steward or committeeperson who has resolved a grievance in a certain way on Monday and is called to investigate a similar grievance on Tuesday knows that the second problem may not necessarily be solved in the same manner as the first. Each situation requires its own unique approach and distinctive solution, and skills in problem solving become accumulative and diverse rather than polarized and similar.

Personal Characteristics

Intellectual curiosity. The trainer should be able to look upon the study-organizer program as an experience that not only will enlighten and broaden his or her own professional skills but also result in that kind of continuing educational process that is the hallmark of every good educator.

Empathy. The trainer should have the ability to communicate with workers about their hopes, plans, fears, and aspirations, in their language and with the necessary empathy to be helpful in positive ways.

Flexibility and openness. The great variety of situations confronting the trainer of study organizers requires the ability to adjust and be flexible. A trainer who is frank and honest in comments, evaluations, and recommendations, and whose suggestions and advice are based upon an earnest desire to help, is going to find the job much easier and enjoyable.

Emotional and physical fitness. Face-to-face communication with the many people with whom the trainer must deal will present a challenge in that no two individuals will have the same needs, viewpoints, conceptions and misconceptions, and hopes and aspirations about the program. Dealing with these variations calls for emotional fitness. The erratic hours of work in the study-organizer program and the equally unpredictable flow of contacts will be physically taxing.

Pragmatism. This trait--of being practical and being able to relay that quality to the workers by directive counseling when the need arises--is essen-

tial to the trainer's role in this study-organizer program. He or she must be able to train the study organizers to handle difficult counseling situations in a pragmatic fashion; for example, workers may believe they can afford to take more courses than their incomes allow, or may think they can work full time and enroll in more courses than could be reasonably completed successfully.

Optimism. The administrator of a worker-student program encounters numerous academic problems, bottlenecks, and unforeseen red tape and bureaucratic regulations. The trainer should be able to look beyond these obstacles and visualize what positive results can be accomplished--if the problems along the way are solved and the workers who are the reason for this program eventually succeed. Optimism means believing that a study-organizer program can be utilized effectively enough to produce a continuing and increasing number of workers who take advantage of postsecondary education to improve their jobs, job security, income, career potentials, and personal fulfillment.

Commitment to goals of the project. This factor implies continuity of application and the desire to see the program successfully implemented. The trainer must be able to see the long-range effects of the study-organizer training program: the number of people affected by it in the future; the impact such education will have upon countless lives, families, and whole communities; the monies being committed to education and job training that would not otherwise be available; and the positive overall results of the program. Commitment on the part of the trainer to achieving these goals is critical to the success of the project.

To summarize, the trainer should be carefully chosen by the sponsor in collaboration with the labor education advisory committee. This person must have the experience, skills, and personal characteristics that will enable him or her to deal with workers and their needs, as well as the other individuals who will be involved in the study-organizer program.

DETERMINING THE ASSISTANTS

After the trainer and the labor education advisory committee have decided on the curriculum for the training program, they can then determine the areas where the knowledge and experience of the trainer may need to be supplemented by the expertise of other individuals from postsecondary educational institutions, unions, companies, and community organizations. The following comments should be considered in selecting these assistants.

Educators

Great care is required in the selection of professional educators from the local academic community to participate in the program. Not every faculty member is qualified to assist in training workers to become study organizers. Educators selected to assist the trainer should have these qualities:

- Knowledge of adult academic interests which may be completely different from those of traditional students with whom the educator most likely will have had more experience.
- Knowledge of counseling techniques from the viewpoint of adult orientation, rather than the traditional student-counseling orientation.
- The ability to communicate with workers on their level, in terms they understand, without adopting a patronizing or condescending approach. The educator should be someone who realizes that what the workers may

lack in academic skills, they probably compensate for in work and "living" skills.

Union Leaders

Union officials who participate in study-organizer training should possess the necessary empathy, experience, ability to communicate, and knowledge of the workplace and the workers in it. In addition, they should have an understanding of such relevant, specific items as the following:

- Work schedules of the workers involved and the relationship of such schedules to educational opportunities and possibilities.
- Relationship of job potential to academic opportunity and the subjects and courses that would increase a worker's potential for promotion.
- National and local union contract provisions and shop rules concerning eligibility for tuition refund programs and the interrelated responsibilities between work and academic attendance requirements.
- Importance of reinforcement to the worker-student from fellow workers, union officers and officials, family, and community.

Company Personnel

If a company is interested in the study-organizer program, it would be helpful to include as a resource person the individual responsible for administering the company tuition refund, training, and employee development programs. It is important that this manager be supportive of workers in their quest for bettering themselves through academic endeavors and realize that old restrictions against a liberal range of course and subject material are no longer valid. Instead the broad, general interests of workers should be considered when reviewing their selections of courses for tuition refund.

Community Representatives

Depending on local conditions, one or more assistants in the training program might be officers in interested community service organizations and/or city or county elected or appointed officials. The most appropriate officials would be those with concerns or responsibilities in the areas of adult education, labor relations, or manpower development.

In conclusion, if the right people are chosen from postsecondary institutions, unions, companies, and community organizations, they should be helpful to the trainer in preparing workers for their role as study organizers.

SELECTING THE STUDY ORGANIZERS

In seeking qualified workers to serve as study organizers, the trainer should request recommendations from the union members of the labor education advisory committee: local union officers, education committee members, and business agents; union officers and education representatives at the regional level; and union officers and education representatives at the international level. The process to be followed in choosing the trainees will vary depending on local factors, but it should involve cooperation between the trainer and the labor education advisory committee.

To assist in making the final selection, the following material provides information on the responsibilities of a study organizer and an indication of the kind of person who could eventually fill that role successfully. It should be understood that in addition to participating in the initial training program, the study organizers will be learning while working on the job. They have to be able to apply newly discovered techniques and approaches in practical, real-life situations. This not only reinforces the knowledge for future use but also permits them to experiment with their own personalities in the development of their approaches. The best study organizers then, under some supervision and with some help, will teach themselves the most effective methods of career and educational advice through constant experimentation, self-evaluation, and self-improvement.

RESPONSIBILITIES

The responsibilities of a study organizer are to:

- Advise workers on a one-to-one and/or group basis
- Refer workers to appropriate places for further assistance
- Follow up with workers to ensure their participation in educational activities
- Develop effective ways to reach workers
- Work with union, education, company, and community officials to help eliminate barriers to worker participation in educational opportunities
- Maintain a collection of up-to-date career, education, and tuition refund information
- Maintain records of study-organizer center activities
- Work cooperatively with the other study organizers to operate the center effectively
- Publicize the study-organizer center to workers on a continuing basis by preparing brochures and posters

SKILLS AND ABILITIES

In order to carry out these responsibilities, a study organizer should have the ability to:

- Work with minimal supervision
- Communicate with workers and with union, education, company, and community officials
- Solve problems constructively
- Understand the career-planning process
- Understand educational tuition refund requirements
- Become familiar with union, company, and educational institutions' operating procedures relating to this program
- Use group and individual advising skills with workers
- Work constructively with people of different educational and social backgrounds

EXPERIENCE

To be effective, a study organizer should have the following experience:

- Participation in union activities
- Involvement in service activities with the union, company, and/or community
- Enrollment in postsecondary courses within the previous three years
- Participation in the tuition refund program

The information gained through such experience is difficult to teach. By being in the same environment as their fellow workers, study organizers will be able to understand the best ways to reach them and know the barriers that may have to be overcome. Having taken courses and participated in the tuition refund program will give the study organizers an understanding of how to register for courses at an educational institution and apply for a tuition refund. Some study-organizer candidates may have the potential to be effective without these experiences because they have other qualities which compensate for this lack, such as the personal characteristics discussed next. In these cases the selection committee must consider the matter carefully and use its judgment.

PERSONAL CHARACTERISTICS

In addition to certain experience and abilities, particular personal characteristics contribute to the effectiveness of a study organizer.

Even tempered and friendly. This characteristic is especially important because many workers may be reluctant to discuss going back to school. A study organizer with a personality that helps put people at ease and establish rapport will be effective. This does not mean that the study organizer must be an easy-going person all the time; there might be situations that would require a firm approach, but never to the point of becoming domineering.

Empathy. Study organizers must have a serious sense of empathizing with and caring about people--their goals, problems, lives, and personal fulfillment--without being overindulgent in their concern.

Self-Confidence. Study organizers must possess the self-esteem that allows them to draw on their own strengths and experiences, as well as the

new knowledge they will be acquiring, to help other people. If they do not exhibit an ability to deal with their own lives and problems in a positive way, they certainly will not convince others that they can cope with their concerns.

Optimism. There will be many unknown and unexpected problems ranging from center operational procedures to complex situations presented by workers. A study organizer should have a firm belief that problems can be solved although some may take longer than others.

Pragmatism. Perhaps the most important personality trait for study organizers is the ability to use common sense. They will be faced with many reluctant and even suspicious co-workers in their role as study organizers, and will need to use common sense in dealing with problems that cannot possibly be anticipated and for which there are no standard answers.

After reading the preceding descriptions, one might wonder if there is a worker who would meet all these requirements. The answer is probably not. However, there are workers who have the potential and commitment to fill this position and learn what they need to know. It is most important to select study organizers who have a genuine belief that learning new skills, improving old ones, and acquiring further education really will help people improve their work and life situation.

SETTING UP A TRAINING PROGRAM

SELECTING THE TRAINING SITE

Most of the training for the study organizers will take place in a classroom. It could be located in a postsecondary educational institution, a union hall, a community building, or a company plant. The trainer should choose the training site carefully taking into consideration the points discussed in this section.

The geographical location of the site should be easily accessible from the study organizers' workplace by public or private transportation. If they will be traveling by automobile, there should be adequate parking space available.

The classroom itself should be furnished to accommodate small discussion groups with round tables and comfortable chairs to encourage the kind of circular communication so essential in teaching adults effectively. Seating arrangements should stress informal procedures and a relaxed atmosphere. Trainers are advised against choosing a classroom with the traditional armrest chair because it encourages singular (teacher-to-pupil) communication and is certain to be equated with prior learning experiences, some of which may have been negative.

Because audiovisual materials will be used extensively in the training, the room selected should be suitable for such presentations (e.g., the windows should have shades or heavy curtains), and the necessary equipment should be available.

Noise is a distraction that can affect the presentation, reception, and effectiveness of any training session. Care must be taken to choose a training site that is relatively noise free.

Both excessive and inadequate lighting are to be avoided. The key is to have room lighting that is not glaring, yet not so dim as to strain the eyesight--lighting that will enable everyone to read and see what's going on at all times.

Proper ventilation is another factor to consider. The trainer does not want to lose members of the audience by having them complain about the coldness of the classroom or become drowsy by sitting in an overheated room.

In far too many classroom settings, these details are either ignored by the instructors or casually overlooked as being beyond the control of the trainer or of little consequence to the purpose of the session. Giving the proper attention to the physical environment at the outset will make it much easier to conduct an effective program.

SCHEDULING

Scheduling the training program's classes must be coordinated by the trainer with the labor education advisory committee. The time for the meetings should be weighted in favor of the people for whom the programs are being implemented, rather than the those conducting the classes. Proper attention must be given to the study organizers' work hours, and an effort made to coordinate their work, leisure time, and family schedules.

CHOOSING MATERIALS

Print and audiovisual materials should be used as needed in the training sessions. It is expected that the trainer will want to use 16mm films with projectors, 35mm slides and projectors, an overhead projector and suitable transparencies, and videotaping equipment.

Printed materials made available to the training participants could include information on postsecondary education, career planning, and company tuition refund and job classifications. Union materials might also be available on contracts, tuition refund programs, teaching and training discussion leaders, leadership and administrative skills, and procedural information and directives. Community educational materials concerning civic and social, appointive and political organizations may be of interest to workers.

CREATING AN ATMOSPHERE CONDUCIVE TO LEARNING

To establish and maintain a positive training environment for the program, the physical surroundings, as previously noted, must be conducive to an adult education experience. As for the interrelationship between the trainer and the study-organizer trainees, the emphasis should be on the kind of peer relationship that leads to a mutually satisfying learning situation. The following suggestions are intended to help the trainer create such an environment.

1. Meetings should start--and end--on time.
2. The trainer should be in the classroom well ahead of time to greet the participants as they enter the classroom.
3. Any audiovisual equipment to be used in a session should be set up and ready to use before the start of the class.
4. All handout materials should be in the proper sequence for distribution and in sufficient quantity to provide each participant with a copy.
5. The appropriate seating arrangement for an adult education class (as previously discussed) should be set up before the class begins.
6. Provisions for a mid-session coffee break should be made. Having the participants take turns providing the coffee seems to work very well.
7. The proper balance between lecture and discussion methods of teaching should be maintained.
8. In presenting information, the trainer should be careful not to get bogged down in educational jargon. It is important to communicate with workers on their own level without being patronizing or condescending. The trainees will respond when presentations and activities are pragmatic.
9. The trainer should know the purpose of each training exercise and be able to explain it. This is best achieved by understanding where each activity fits into the larger objective. After introducing the exercise, the trainer should encourage questions and make any necessary clarifying statements.

10. The use of questions, as they apply to an adult education situation, should be utilized by the trainer, with sufficient time for the consequent group discussions that are certain to emanate from such questions.

11. When conducting discussions or asking questions, the trainer should listen attentively to the responses rather than thinking of what to say next. Otherwise the trainer is likely to miss the point or, even worse, the feeling of a speaker's statement. Unnecessary interruptions should be avoided. Brief silences in a discussion shouldn't be of concern; people need time to think before they speak.

12. The trainer should try to include all group members in the discussions. Some people hesitate to speak in groups even though they may be eager to participate, and they will need to be eased into a discussion. On the other hand, some individuals may want to dominate the discussion, and the trainer will have to intervene to give others a chance to speak. Also, participants should always have the option of "passing" in an activity or a discussion. The trainer can only encourage participation, not mandate it.

13. The study-organizer training sessions will deal with sensitive issues that may not be easily resolved. Since these sessions may include study organizers, educators, and union, company, and community representatives, there will be very divergent viewpoints. An atmosphere of mutual trust must be created so that there can be a free exchange of ideas without fear that a statement could be used against a person at a future time. The trainer must be alert to keep the interaction among the participants healthy, positive, constructive, and to the point.

14. It is important that the trainer be adaptable to interruptions in the form of questions from workers. To be able to stop during a presentation, listen to a student ask a question or talk about the issue at hand, answer the question, and then go back and pick up the thread of discussion is the mark of a successful adult education instructor.

15. In an adult education class, unlike that involving the traditional student, group participation is free-flowing and continuing. Anecdotal experiences generally unknown and inappropriate in traditional classes are frequently the norm in adult education classes. The instructor who understands this can go with the flow of discussion and still inject enough control over the situation to be able to cover the lesson plan for the session.

16. The trainer should be available to the trainees outside of class for consultation and counseling.

Successfully creating a conducive atmosphere for learning depends upon a combination of the proper physical facilities, adequate materials, relevant subject matter, and the instructor. Of these, the role of the instructor overshadows all others. For this reason the suggestions made here should be considered not only by the trainer, but also by others who will be assisting in the training program.

PROVIDING FOR FEEDBACK AND EVALUATION

An astute trainer will know by the group interaction during and immediately after the sessions whether or not an atmosphere for learning has been established. The kinds of questions asked and the involvement of all participants are important indicators of how well the training is going. By talking to the participants informally after sessions, the trainer will start to obtain information about what did and did not go well in a session.

Formal written evaluation of the training should be brief. Trainees could be asked to answer the following questions:

1. Did the training session meet your expectations as you prepare to become a study organizer?
2. What other topics would you like to have seen presented?
3. In participating in the exercises, what skills did you use well? What skills do you need to develop?
4. Would you have liked more time to practice the skills?

One way to obtain more information is to have the participants discuss their written evaluations after they hand them in if the trainer feels they would be willing to do this.

Feedback after the training sessions are completed will be most helpful in identifying what aspects of the training were effective in their application to actual advising situations. Such evaluation should be sought not only from the study organizers but also from any union, educational, and company representatives who participated in the training and who are involved in the program on an ongoing basis. Their responses can help the trainer decide if there should be follow-up sessions and what the content should be.

OFFERING FOLLOW-UP SUPPORT

The study organizers will need follow-up support while the center is in operation. This will be especially important during and immediately after the establishment of the center. The trainer should be accessible by phone and available to go to the center to observe and provide assistance to the study organizers. The need for this assistance will decrease as the study organizers gain more experience. These informal meetings will also help the trainer decide whether to hold more formal training sessions on specific topics.

The trainer should also maintain ongoing communication with educators, union officers, and the company officials responsible for the tuition refund program. This should occur largely on an informal basis, although periodic meetings with the labor education advisory committee and the study organizers are recommended to review the program and make modifications where necessary. This kind of follow-up will help to ensure support for continuation of the program.

TRAINING OBJECTIVES

The information recommended for inclusion in a study-orgranizer training program has been organized around 11 objectives, in the following sequence:

Objective 1--Participants will become familiar with the purposes of the study-organizer training program.

Objective 2--Participants will become familiar with educational opportunities and resources in the local geographic area.

Objective 3--Participants will know how the tuition refund program works.

Objective 4--Participants will become familiar with the career-development process and relate it to union and company careers.

Objective 5--Participants will know about how to apply for financial assistance and veterans benefits.

Objective 6--Participants will become familiar with admission and registration procedures of area postsecondary educational institutions.

Objective 7--Participants will know how to use advising and counseling techniques.

Objective 8--Participants will know ways to overcome obstacles that may prevent a worker from enrolling in courses or completing a degree program.

Objective 9--Participants will become capable of setting up a study-organizer center.

Objective 10--Participants will know how to operate a study-organizer center.

Objective 11--Participants will know how to make workers aware of educational opportunities available to them.

This curriculum guide should be reviewed by the trainer and the labor education advisory committee and adapted to meet local conditions.

Once the broad outlines of an individual program have been determined, the trainer can use the material on the following pages to plan the training sessions. In the section for each objective, there is a short list of learner outcomes and suggestions as to number of sessions, instructional techniques, and location. To assist further in achieving each objective, information is provided under the headings "Strategies and Activities," "Suggestions to the Trainer," "Handout Materials," and "References." The References list source materials for the trainer to review and possibly assign to the class. In the lists of Handout Materials the starred items are included at the end of the

section and may be duplicated by the trainer for distribution to the class. Some lists also include other suggested handouts that the trainer must prepare or obtain locally because of their individual nature (for example, a list of local postsecondary institutions or college catalogs).

In developing a training program, it is anticipated that a trainer will want to adapt the material presented here to meet local needs and to suit his or her personal teaching style.

OBJECTIVE 1—Participants will become familiar with the purposes of the study-organizer training program.

Learner Outcomes

Participants will be able to:

- State the goals and purposes of the training program
- Explain the study-organizer concept
- List what skills and abilities a study organizer should possess

Number of Sessions

One

Instructional Techniques

Lecture, group discussion

Location

Training site

Strategies and Activities

- The trainer should explain the program and have the participants introduce themselves at this session.
- An opportunity for the resource people to make brief introductory remarks should follow the trainer's introductory activities.
- The trainer should hand out the course objectives and the list of a study organizer's responsibilities and review them with the group.

Suggestions for the Trainer

Before beginning the session, reread the material under the headings "Creating a Conducive Atmosphere for Learning" and "Providing for Feedback and Evaluation" in the previous section of this manual. In this first session, it is important to set the proper tone for the training. Emphasize the need for the trainees to attend all the meetings. Be sure to set up an atmosphere that combines both informality and seriousness of purpose.

The workshop materials, listed under the references, should be reviewed when planning this training program. These materials will give the trainer a good understanding of how to conduct workshops for workers.

Let's Talk about Introductions*

When people know each other, they are more at ease. When they are more at ease, they learn better, and your job is that much easier. You want to put your class as much at ease as possible. Using this method of introduction can help.

*Adapted from: The Role of the Union Representative as a Discussion Leader. Detroit: UAW, 1978, p. 20.

1. Meet the participants at the door as they come into the classroom. If you can offer them a worksheet or handout, do so as you introduce yourself, shake hands, and bid them welcome.

2. When the entire training group has assembled and has been seated, ask the members to get up, go about the room, and introduce themselves to each other. Join in because you may have missed someone in the beginning.

3. After they have returned to their tables, again introduce yourself as their discussion leader. Tell them something about your background and experience in adult education. Ask each of them to stand and state their name, local union number and location, office held now or in the past, and what he or she expects to gain from the study-organizer training course.

4. Count the number of tables and the number of delegates. Try to get from three to seven people at each table. Ask the entire group to count off, from one to three, five, or seven. Then seat all the "ones" at a table, the "twos" at another, and so on. When this is done, ask everyone to introduce themselves to the others at the table.

What you have accomplished is four rounds of introductions. Why is this important to you as an adult education discussion leader? In most cases, the adult educator comes into the classroom, introduces himself or herself, and asks everyone in the room to stand up and do the same. What happens? Each person stands up in isolation, and few people, if any, catch the others names the first time around. Taking a little more time to get the participants in the class to know each other pays dividends in friendliness, interest, and attention, all conducive to a better-than-average learning situation.

Handout Materials

- Responsibilities of a Study Organizer*
- Study Organizer Course Objectives*

References

Building Effective Local Union Education Programs Workshop. Order from UAW Education Department, 8000 East Jefferson, Detroit, Michigan 48214.

Knowles, Malcolm, The Modern Practice of Adult Education: Andragogy versus Pedagogy. New York: Association Press, 1970.

Local Union Discussion Leader Training Workshop. Order from UAW Education Department, 8000 East Jefferson, Detroit, Michigan 48214.

Role of the Union Representative as a Discussion Leader, The. UAW Publication 448, 1978. Order from UAW Education Department, 8000 East Jefferson, Detroit, Michigan 48214. $1.

Schoenfeld, Max W., "Labor, Management Join to Stimulate Education," Adult Learning, Vol. 16, May 1967, pp. 37-40.

Wirtz, Willard, The Boundless Resource: A Prospectus for an Education Work Policy. Washington, D.C.: New Republic Book Company, 1975.

*Included in this volume.

Objective 1

Responsibilities of a Study Organizer

- Advise workers on a one-to-one and/or group basis
- Refer workers to appropriate places for further assistance
- Follow up with workers to ensure their participation in educational activities
- Develop effective ways to reach workers
- Work with union, education, company, and community officials to help eliminate barriers to worker participation in educational opportunities
- Maintain a collection of up-to-date career, education, and tuition refund information
- Maintain records of study-organizer center activities
- Work cooperatively with the other study organizers to operate the center effectively
- Publicize the study-organizer center to workers on a continuing basis by preparing brochures, posters, and similar materials.

Study-Organizer Course Objectives

Objective 1--Participants will become familiar with the purposes of the study-organizer training program.

Learner outcomes: Participants will be able to:

- State the goals and purposes of the training program
- Explain the study-organizer concept
- List what skills and abilities a study organizer should possess

Objective 2--Participants will become familiar with educational opportunities and resources in the local geographic area.

Learner outcomes: Participants will be able to:

- List the educational institutions in the local geographic area
- Describe the general offerings of those educational institutions
- Know where the area's educational institutions are, how to get there, and what offices or buildings to go to for information
- Know who at each educational institution can provide more information about the institution

Objective 3--Participants will know how the tuition refund program works.

Learner outcomes: Participants will be able to:

- State eligibility criteria for tuition refund
- Outline how to apply for tuition refund
- Complete a tuition refund application
- Give examples of courses that are eligible for tuition refund

Objective 4--Participants will become familiar with the career-development process and relate it to union and company careers.

Learner outcomes: Participants will be able to:

- Identify their personal needs and interests and relate them to career options
- Locate sources of career information
- Relate these career opportunities to courses and programs in local postsecondary educational institutions

Objective 5--Participants will know about how to apply for financial assistance and veterans benefits.

Learner outcomes: Participants will be able to:

- Describe the major kinds of financial aid available
- Describe the veterans educational benefits available
- Explain the criteria in awarding financial aid and veterans benefits
- Identify the financial aid and veterans counselors at educational institutions
- Outline and discuss the procedures to apply for financial and veterans educational assistance

Objective 6--Participants will become familiar with admission and registration procedures of area postsecondary educational institutions.

Learner outcomes: Participants will be able to:

- Outline and explain the procedures in applying for admission to post-secondary institutions

Objective 1

- Complete admissions forms
- Read postsecondary institutional master schedules
- Outline and explain the procedures in registering for courses in postsecondary institutions
- Complete registration forms

Objective 7--Participants will know how to use advising and counseling techniques.

Learner outcomes: Participants will be able to:

- Understand the verbal and nonverbal communications processes
- Use questioning and listening skills in advising workers
- Use decision-making skills in advising workers
- Use referral skills in advising workers

Objective 8--Participants will know ways to overcome obstacles that may prevent a worker from enrolling in courses or completing a degree program.

Learner outcomes: Participants will be able to:

- Identify and describe major obstacles to worker participation in education
- Suggest strategies to overcome obstacles to worker participation in education

Objective 9--Participants will become capable of setting up a study-organizer center.

Learner outcomes: Participants will be able to:

- Describe the physical features of a study-organizer center
- Draw a layout of a study-organizer center
- List the furniture and materials needed for a study-organizer center
- Know how and where to obtain furniture and materials for a study-organizer center
- Develop a plan of tasks to be completed in establishing a study-organizer center

Objective 10--Participants will know how to operate a study-organizer center.

Learner outcomes: Participants will be able to:

- Develop the operational procedures for a study-organizer center
- Start a study-organizer center

Objective 11--Participants will know how to make workers aware of educational opportunities available to them.

Learner outcomes: Participants will be able to:

- Use their understanding of the barriers to worker participation in education to develop promotional strategies to increase participation
- Collect information from workers to help determine effective methods to reach workers
- Develop and implement a plan to publicize educational opportunities available to workers

OBJECTIVE 2—Participants will become familiar with educational opportunities and resources in the local geographic area

Learner Outcomes

Participants will be able to

- List the educational institutions in the local geographic area
- Describe the general offerings of those educational institutions
- Know where the area's educational institutions are, how to get there, and what offices or buildings to go to for information
- Know who at each educational institution can provide more information about the institution

Number of Sessions

Two to three

Instructional Techniques

Field trips, large and small group discussion, audiovisual, lecture

Locations

Educational institutions

Strategies and Activities

- Field trips should be conducted to the educational institutions in the area. Each educational representative should brief the study-organizer trainees upon arrival at the institution. Specific offices to visit would be admissions, registration, career counseling and/or counseling, financial aid, and veterans affairs.
- Catalogs should be handed out for each institution with the most important sections and pages indicated for review. At least one catalog should be reviewed in-depth by an educational representative to give the trainees familiarity with how to use the materials.
- Have the trainees pair off and review a list of questions often asked about educational offerings and have them use the institutional literature including a catalog to answer them. The trainees should meet in a large group and list on a chalkboard, overhead projector, or flip chart, any questions they might have. The trainer should then lead the discussion in answering these along with the educational representatives.
- A presentation should be made about the ways to earn credit through non-traditional learning experiences (e.g., in the military, work, continuing education, union education). Have the trainees volunteer their life experiences and show how credit might be obtained by examination, evaluation of life experience, and/or portfolio development.

Suggestions for the Trainer

The trainer should have the details of the postsecondary institution field trip carefully arranged well ahead of time. It is especially important to be sure that there will be a representative at each educational institution to

speak to the trainees. The ideal person would be the educator permanently assigned by the educational institution to counsel and advise workers. You may want to meet with the educational representatives before this field trip to brief them on what you are looking for and what their role might be. For many of the trainees, this may be the first time they have visited such a postsecondary institution. Because they may feel uncomfortable at first, it is important to impress upon the educational representatives the need to create a friendly and nonthreatening atmosphere.

You may want to have all the participants travel together in a van to the educational institution. This will enable you to use the driving time to answer questions and introduce the next experience of the field trip.

These sessions should not deal with the specifics of admissions and registration which will be covered in another objective. Rather, the focus should be on familiarizing the trainees with the educational setting and the kinds of programs and offerings that are available.

A sufficient amount of time should be devoted to nontraditional ways to obtain credit. To many workers the length of time required to obtain a degree is a major barrier to getting started. If the study organizer can explain that there are various ways to get a head start on obtaining a degree, then workers may be more likely to enroll in courses. The possibilities that trainees should understand include the College-Level Examination Program (CLEP) of the College Board, credit by examination, military service credits, union educational course or workshop credits and/or certificates, post college credits, apprenticeship-earned credits, vocational education credits, and credits for a varied and multiple list of life experiences.

Handout Materials

- A list of area educational institutions
- A map of the local geographic area pinpointing the postsecondary educational institutions
- Academic and continuing education catalogs and other literature for area educational institutions
- A list of questions often asked about postsecondary educational offerings
- A list of contact people at the postsecondary educational institutions
- A list of apprenticeship programs in the local geographic area
- Educational Terminology*

References

American Council on Education, The National Guide to Credit Recommendations for Noncollegiate Courses. Washington, D.C.: American Council on Education, 1979.

Blaze, Wayne, and John Nero, College Degrees for Adults. Boston: Beacon Press, 1979.

Flaugher, Ronald L., Credit by Examination for College-Level Studies: An Annotated Bibliography. New York: College Entrance Examination Board, 1967.

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*Included in this volume.

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Objective 2

*Educational Terminology**

Assessment

ACT (American College Tests of the American College Testing Program): National examinations given for determining admission to an institution.

CLEP (College-Level Examination Program of the College Board): National examinations for the purpose of awarding academic credit for professional, cultural, or community activities, or travel that is related to your program of study. Not every educational institution offers this type of credit, and requirements as to test scores vary.

Departmental examination: Special examinations given by individual departments in an institution for the purpose of awarding academic credit and/or advanced standing in a particular field.

Diagnostic testing: Testing to assess what strengths and weaknesses students might have in order to design an educational program to meet their needs.

GED (General Education Development Test): The High School Equivalency Diploma Program provides courses to prepare for the GED examinations. Successful completion of the GED qualifies a person for the High School Equivalency Diploma.

Prior experiential learning: Learning that has been achieved through previous experience such as work or community activities; college-level credit may be given for such learning.

SAT (Scholastic Aptitude Test of the College Board): National examinations given for determining admission to an institution and scholarships.

Programs and Credit

ABE (Adult Basic Education): A program providing an opportunity for people 16 years of age or older to obtain education normally offered in elementary school through the eighth grade. The purpose of ABE is to prepare people for further education and more productive and profitable employment, and to help them become competent and effective citizens.

Accreditation: Recognition of a school's educational quality through membership in a regional association of educational institutions; approval of school's training programs by appropriate professional association; approval by appropriate government agency. Accredited institutions generally give credit for coursework transferred from other accredited institutions.

Apprenticeship: Training in industrial occupations that require planned, on-the-job experience under proper supervision, combined with technical studies in subjects related to the trade.

*Adapted from: Educational Information Center Resource Handbook, Southcentral Iowa Lifelong Learning Project, Regional Cluster III, 1979.

Audit: Taking a course without receiving credit or a grade (frequently tuition and fees are reduced).

CEU (Continuing Education Units): Units awarded for participation in noncredit activities. CEUs are usually recorded by each institution and can be used to document professional or personal continuing education.

Continuing education/community services/community education programs: Programs offered by postsecondary educational institutions as a community service in response to personal enrichment needs and interests, as well as for professional improvement and job advancement.

Credit courses: Classes usually taken toward a degree.

Degree: A document awarded for the completion of a certain number of credit courses.

Noncredit course: Classes usually taken for job improvement, advancement, or for personal enrichment. Noncredit courses rarely count toward a degree.

Nondegree status: Special student status that allows registration in credit classes without being officially admitted to a degree program.

Quarter hour: Hours of credit assigned to a course (see credit courses) and awarded at institutions where the academic year is divided into quarters of about 12 weeks.

Semester hours: Hours of credit assigned to a course (see credit courses) and awarded at institutions where the academic year is divided into semesters of 17-18 weeks.

Transfer of credit: Credit earned at one educational institution accepted by another.

Transcript: An official document citing a student's coursework, number of credits per course, and grades or other evaluations for courses taken.

Open admissions: An educational institution's policy to admit all students who apply to the institution.

Class and Study Formats

AVT (Audiovisual Tutorial): Individualized, self-paced instruction using audio and/or visual media; designed for the learner unable to attend regular classes.

Continuous enrollment/open entry-exit: Courses that may be started at any time and terminated upon completion of a specified amount of work.

Correspondence/home study/independent study: Courses taken through individual study. Minimal or no class attendance is required.

Extension class: A course offered off campus by an educational institution.

Objective 2

Nontraditional student:[1] Any adult 16 years of age or older who is not enrolled in the traditional sequence of learning.

Saturday/evening classes: Traditional and nontraditional courses, both credit and noncredit, offered during evening hours and/or on Saturdays.

Self-paced instruction: The use of audiovisual aids, programmed manuals, or independent study; students may study at their own rate.

Workshop/conference: A seminar for specified intensive study.

Types of Institutions

Postsecondary institution: Educational institution offering courses beyond the high school level.

Allied health school: A school (other than hospital school) offering programs in paraprofessional health or medical fields, such as dental assistance, medical assistance, practical nursing, and mortuary science.

Business/commercial school: A school offering programs in business occupations such as accounting, data processing, word processing, and secretarial science. Also includes special-purpose schools with the following programs: court reporting, finance, insurance, real estate, and sales.

College/university: An institution offering instruction at the college level leading to a bachelor's or higher degree. It frequently offers occupational programs leading to an associate degree, diploma, or certificate (below the baccalaureate) and community services functions.

Community/junior colleges: Institutions providing three major types of programs--(1) transfer, the first and second years of a college program that is to be completed at a four-year college or university; (2) vocational/technical, programs of varying lengths and forms through which students may develop or upgrade vocational competencies; (3) community services, programs, courses, and activities to serve those individual and community needs not best served by college degree or certificate programs.

Correspondence school: A school offering programs that can be completed through home study; the work is sent back to school for evaluation.

Hospital school: A hospital offering programs in paraprofessional health or medical fields, such as nursing or radiologic technology.

Technical institute: An institution (usually two-year) offering instruction in one or more of the technologies below the professional level.

Trade school: A school offering training in one trade or craft or a single cluster of trades or crafts, such as auto mechanics, baking, bartending, carpentry, carpetlaying, commercial diving, cooking, dog grooming,

1. This definition was supplied by the Future Directions for a Learning Society program of the College Board.

drafting, fire protection, horseshoeing, locksmithing, meat processing, police training, truck driving, welding, etc.

Vocational/technical school: A school offering a wide variety of occupational programs or clusters of programs.

Educational Services

Academic assistance: Tutoring or study-skills assistance.

Admissions: Office of a college handling inquiries, evaluation of transcripts and transfer credit, and applications for admission.

Career services center: A department providing career information and counseling to assist one in establishing career goals and plans.

Counseling/advising: College faculty or staff offering specific vocational, educational, and personal counseling.

Financial aid:[2] Comes in three forms: grants and scholarships, which don't have to be repaid; employment or work aid, usually 10-15 hours per week, through which students can earn money to help meet education costs; and loans, which generally carry a low interest rate and are repaid after graduation or when the student leaves school. The federal government, state governments, education institutions, and private organizations can all be sources of financial aid to students in need of help.

Orientation: A special program acquainting new students with an institution, usually held at the beginning of a term.

Placement: A service to assist graduates of an institution in securing employment.

Registrar: The office of a college usually responsible for determining the residence status of each student, issuing identification cards, supervising registration procedures, assessing fees, maintaining all students' academic records and official transcripts, determining graduation requirements, processing applications for degrees, interpreting college academic regulations, and assisting students with selective service and military service matters.

Registration: The process of enrolling in specific courses.

Residence requirements: The location of a student's permanent residence for the purpose of assessing tuition rates.

Student health: Medical services and/or low-cost health insurance available to students.

Veterans affairs: The office of a college assisting veterans with application and enrollment procedures and in applying for Veterans Administration benefits.

2. This definition was supplied by the College Scholarship Service of the College Board.

OBJECTIVE 3—Participants will know how the tuition refund program works.

Learner Outcomes

Participants will be able to:

- State eligibility criteria for tuition refund
- Outline how to apply for tuition refund
- Complete a tuition refund application
- Give examples of courses that are eligible for tuition refund

Number of Sessions

One to two

Instructional Techniques

Lecture, small and large group discussions

Location

Training site

Strategies and Activities

- Before the session review and discuss the contract language relating to the tuition refund plan with union and company officials.
- At the session have the union and company officials give their interpretations of the plan. Open the floor for a question-and-answer session at this point, if necessary, for clarification.
- Hand out the contractual provision to apply for a tuition refund and have the company resource person review it.
- Have the participants complete a tuition refund application and discuss it with them.
- Hand out a list of possible courses that might be eligible for tuition refund. Have the participants pair off and decide why each course would or would not be eligible. Review the list with the larger group.

Suggestions for the Trainer

In advance of the session, the trainer should review contract language with union and company officials together so that any differences in interpretation are clarified before the information is presented to the trainees. For much of this session the trainees should be involved in filling out the tuition refund application and reviewing what courses might be eligible. These activities will give the trainees an understanding of the plan and also provide an opportunity to reinforce communicating with union and company officials responsible for the tuition refund program. It is important to have the trainees become familiar with the courses that are eligible for tuition refund. This may be time consuming but is necessary if the trainees are to understand the possible options that are available to workers.

Handout Materials

- Tuition refund contract language
- Tuition refund application forms
- List of potential tuition refund courses

References

Sheerin, Harry S., "Tuition Aid Concepts at Kimberly Clark Show Dramatic Results," Training and Development Journal, December 1977, pp. 8-10.

UAW Tuition Refund Program. UAW Publication 404, 1976. Order from UAW Education Department, 8000 East Jefferson, Detroit, Michigan. 48214. 100 copies for $15. [Note: This booklet includes a comprehensive list of questions most commonly asked by workers about the UAW Tuition Refund Program.]

OBJECTIVE 4—Participants will become familiar with the career-development process and relate it to union and company careers.

Learner Outcomes

Participants will be able to:

- Identify their personal needs and interests and relate them to career options
- Locate sources of career information
- Relate these career opportunities to courses and programs in local post-secondary educational institutions

Number of Sessions

Two to three

Instructional Techniques

Lecture, large and small group discussion

Location

Training site

Strategies and Activities

- The trainer will lead a discussion on the importance of knowing personal needs and interests as well as abilities in planning a career.
- The trainer will introduce the activities described in the handouts for this objective. Ask the participants to keep a record of their responses for use in the study-organizer center.
- The trainer will, using copies of pages taken from the Dictionary of Occupational Titles, The Occupational Outlook Handbook, and any other career information resource directly related to the union and the company, give a presentation on how to use the resources.
- As a review of the related activity under Objective 3 and using information learned about career opportunities in the union and the company, the participants should work together in groups of two to compile a list of potential courses and/or programs that might be eligible for tuition refund. A large group discussion should take place after this activity with the trainer developing a master list of potential courses that relate to careers.

Suggestions for the Trainer

By having the participants become aware of their career interests, they will be able to be sensitive to the workers they will be advising. Although the activities described in the handouts are planned for delivery in a group setting, they can be adapted to one-to-one counseling situations.

Use yourself as an example to illustrate the procedures to be followed in each activity. By working through the activity in this way, you not only give participants a good example of what is expected but also validate the activity as worth doing. You have shared your experience with the group, and it will be easier for participants to share their own experiences.

Whenever appropriate, use "I learned" statements to conclude an activity. These statements have two purposes: (1) to bring a group activity to a close, and (2) to emphasize new learning. At the end of the activity have participants think silently for a few minutes and then complete one of the following:

a. I learned that I...
b. I became aware that I...
c. I was surprised that I...
d. I was pleased that I...
e. I was disappointed that I...
f. I see that I need to...

Point out that each statement has the pronoun "I" in it twice. The completions should reflect the participants' own lives and what they have learned about their own experiences rather than factual information from books. Have the participants volunteer their completed statements without collaboration or discussion. Encourage everyone to take part.

This session is not intended to make career counselors out of the study organizers. The objective is to make them aware of the career-planning process and to have them start to think of the variety of career options the company has in relation to the available courses. The large group discussion should be helpful to the study organizers in helping them see the wide range of course and program offerings that could be eligible for tuition refund.

Be sure to familiarize yourself with the Dictionary of Occupational Titles and The Occupational Outlook Handbook before the session. Unfortunately these books tend to intimidate the reader. Your job will be to help the participants learn how to utilize the information that the books contain.

Since this session will include a review of the courses eligible for tuition refund, it is important to have the individuals present from the union and from management who are knowledgeable about and can adequately describe the tuition refund program. These people will be able to help clarify the interpretation of what can be eligible for tuition refund. There may be some questions that will not easily be answered, and the trainer should be alert to keep the discussion on a positive and constructive track.

Handout Materials

- 20 Things You Love to Do*
- Quick Self-Assessment Activity*
- "Birds of a Feather Flock Together" Activity*

References

Bolles, Richard N., What Color Is Your Parachute? Berkeley, Calif.: Ten Speed Press, 1978.

Crystal, John C., and Richard N. Bolles, Where Do I Go with My Life? Somers, Calif.: Seabury Press, Inc., 1974.

Goodman, Jane, Sylvia Walworth, and Elinor Waters, Down with the Maintenance State: Career Development for Adults. Rochester, Mich.: Oakland University, Continuing Education Center, 1975.

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Lathrop, Richard., Who's Hiring Who? Berkeley, Calif.: Ten Speed Press, 1977.

Loughary, John W., and Theresa N. Ripley, Second Chance: Everybody's Guide to Career Change. Eugene, Ore.: United Learning Corp., n.d.

Schuchat, Theodore, Planning the Rest of Your Life. Bloomington, Ind.: Phi Delta Kappa Educational Foundation, 1975.

U.S. Department of Labor, Dictionary of Occupational Titles. Washington, D.C.: U.S. Department of Labor, 1977.

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*20 Things You Love to Do**

Purpose: To identify the patterns that exist in our pleasurable experiences.

To begin seeing pleasurable experiences and work as compatible.

Approximate time: 20 - 30 minutes

Materials: Easel
Newsprint
Marker

Procedure:

1. Have group number from 1 - 20 down the middle of a piece of paper.
2. To the right of the numbers, list 20 things you love to do. Often it helps to think of activities associated with the seasons.
3. When group members have listed as many things as possible approaching 20, have them code each item on their list. Write the following codes, one at a time, on newsprint.

$	If it costs more than $5 each time you do it
A	Something you do alone
P	Something done with other people
AP	If it's enjoyed equally alone or with others
N5	Items which would not have been listed 5 years ago
1-6-12	If something was done at least 1 month ago, 6 months ago, 12 months ago
J	If it is job related
____	Any code individuals want to use (with parents, requires planning, etc.)

Follow-up: Proceed with discussions on patterns, etc.

Note: Have group members file their responses to this activity for later use.

*From: Michael J. Simeone and Rochelle Litman, editors, Peer Counseling and Employment Skills Training: Group Leader's Handbook. Glassboro, N.J.: Glassboro State College, Office of Career Education, 1978, p. 59.

Objective 4

*Quick Self-Assessment Activity**

Purpose: To survey briefly an individual's needs and expectations regarding a career.

Approximate time: 30 minutes

Materials: Self-Assessment Sheet†

Procedure:
1. Hand out Self-Assessment Sheet.
2. Ask group members to complete sentence stems as concisely as they can.
3. After everyone has completed the sentences, break into triads and discuss responses to activity.

Follow-up: "I Learned" statements or large group discussion about awareness gained.

*From Michael J. Simeone and Rochelle Litman, editors, Peer Counseling and Employment Skills Training: Group Leader's Handbook. Glassboro, N.J.: Glassboro State College, Office of Career Education, 1978, p. 65.

†Included in this volume.

Self-Assessment Sheet

1. Basically, I'd like a job in which I _____

_____

_____

2. Usually, I am the kind of person who _____

_____

_____

3. When things aren't going well, I _____

_____

_____

4. I want to become the kind of person who is _____

_____

_____

5. I like such things as _____

_____

_____

6. Ten years from now I _____

_____

_____

7. On a job, I'm best at _____

_____

_____

8. My greatest weakness is _____

_____

_____

Objective 4

9. I usually react to negative criticism by _____

_____

_____

10. During the past few months I've been _____

_____

_____

11. The next thing I'm going to try to accomplish is _____

_____

_____

12. My general image of myself is _____

_____

_____

13. I prefer to work with people who _____

_____

_____

14. Right now I'm feeling _____

_____

_____

15. The next step in my career development seems to be _____

_____

_____

16. I need to _____

_____

_____

17. I'm hoping that _____

_____

_____

18. I see myself as _____

_____

_____

19. If I could just _____

_____

_____

20. My own personal goals are to _____

_____

_____

Objective 4

*"Birds of a Feather Flock Together" Activity**

Purpose: To enable group members to identify career areas that correspoond to their personality-interest categories.

Approximate time: 30 minutes

Materials: Personality-Interest Sheet†
Holland's Theory of Vocational Choice†
Job List†

Procedure:

1. Handout the Personality-Interest Sheet and Holland's Theory of Vocational Choice. Ask group members to read the directions and complete the Personality-Interest Sheet. After an individual has completed the sheet, he can read Holland's Theory.
2. When all group members have finished reading Holland's Theory, ask them to group according to their personality-interest categories (e.g., all RCS's together, all ASI's, etc. If there is no one who shares all three categories with anyone else, ask him/her to group according to the first two categories, or the most similar.)
3. When groups have formed, ask members to discuss responses to the following questions:
   a. Are you surprised about the makeup of your group? Who did you not expect to be there? Who is not in the group that you expected to be there?
   b. Does Holland's Theory appear to apply to you?
4. Hand out the Job List. Have group members identify specific jobs according to their personality-interest categories. Discuss in the group.

Follow-up: Discuss activity in large group.

Note: Have group members file their responses to the Personality-Interest Sheet for later use.

*From: Michael J. Simeone and Rochelle Litman, editors, Peer Counseling and Employment Skills Training: Group Leader's Handbook. Glassboro, N.J.: Glassboro State College, Office of Career Education, 1978, p. 77.

†Included in this volume.

Personality-Interest Sheet

Imagine that you have just entered a room in which a rather large party is taking place. You notice that people are clustered into six groups and that each of the groups contains people with similar interests. Here are the groups and their interests:

R - People who have interests and/or abilities in athletics or mechanical things. They like to work with machines, tools, plants, and animals, and prefer to be outdoors.

I - People who prefer to observe and investigate. They enjoy gathering information, evaluating, and solving problems.

A - People with artistic abilities. They feel most comfortable in unstructured work situations where they can use their creativity and imagination.

S - People who like to work with people. They get satisfaction from informing, training, helping, and curing others. They are also skilled in verbal communication.

E - People who also like to work with people, but their enjoyment comes from influencing, persuading, and leading them. They like to perform or manage for personal profit, gain, or growth.

C - People who like to work with data, information, or numbers. They prefer highly organized activities and are good at carrying out details and following through on other's ideas or instructions.

Which group would you most enjoy being with for the longest time? Write the letter of that group in the space below:

1. ( )

After a short period of time, everyone in your group except you leaves the party. Of the remaining groups, which one would you enjoy being with for the longest time? Write the letter of that group below:

2. ( )

After a short period, this group also dissolves and the people leave the party. Choose a last group, from those remaining, that you would enjoy being with for the longest time. Write the letter of that group below:

3. ( )

Objective 4

Holland's Theory of Vocational Choice*

Holland's chief premise is that each of us can be described in terms of our similarity to one or more of six idealized personality types and that each type seeks out a different kind of occupational environment. In the most simple terms, his theory reflects the view that "birds of a feather flock together" with respect to occupational choice. Holland also assumes that the extent to which persons are satisfied, stable, and achieving depends upon the extent to which their personalities and work environment are compatible.

The personality types and characteristics associated with them are described below. The descriptions suggest the following kinds of information for persons resembling this type:

a. the general kind of activities the person will enjoy

b. the type of occupation he or she will find most comfortable

c. the kind of problems he or she will be most willing to deal with

d. the kind of people who will be found to be most appealing as co-workers.

Of course, people should not be abruptly categorized or labeled on the basis of these six types, but assessing one's resemblance to two or three codes can give a useful, immediate overview.

R - theme: Extreme examples here are rugged, robust, practical, physically strong, and frequently aggressive in outlook; such people usually have good physical skills, but sometimes have trouble expressing themselves in words or in communicating their feelings to others. They like to work outdoors, and they like to work with tools, especially large, powerful machines. They prefer to deal with things rather than with ideas or with people. They generally have conventional political and economic opinions, and are usually cool to radical new ideas. They enjoy creating things with their hands and prefer occupations such as mechanic, construction work, fish and wildlife management, laboratory technician, some engineering specialties, some military jobs, agriculture, or the skilled trades. Although no single word can capture the broad meaning of the entire theme, the word realistic has been used to characterize this pattern, thus the term R-theme.

I - theme: This theme tends to center around science and scientific activities. Extremes of this type are task oriented; they are not particularly interested in working around other people. They enjoy solving abstract problems and have a great need to understand the physical world. They prefer to think through problems rather than act them out. Such people enjoy ambiguous challenges and do not like highly structured situations with many rules. They frequently have unconventional values and attitudes

*Adapted from: John Holland, Making Vocational Choices: A Theory of Careers. Englewood Cliffs, N.J.: Prentice-Hall, 1973. The categories presented here are from Holland's work.

and tend to be original and creative, especially in scientific areas. They prefer occupations such as design engineer, biologist, social scientist, research laboratory worker, physicist, technical writer, or meteorologist. The word investigative is used to summarize this pattern, thus I-theme.

A - theme: The extreme type here is artistically oriented, and likes to work in artistic settings where there are many opportunities for self-expression. Such people have little interest in problems that are highly structured or require gross physical strength, preferring those that can be dealt with through self-expression in artistic media. They resemble I-theme types in preferring to work alone, but have a greater need for individualistic expression, are usually less assertive about their own opinions and capabilities, and are more sensitive and emotional. They score higher on measures of originality than any of the other types. They describe themselves as independent, original, unconventional, expressive, and tense. Vocational choices include artist, author, cartoonist, singer, dramatic coach, poet, actor or actress, and symphony conductor. This is the artistic theme, or A-theme.

S - theme: The pure types here are sociable, responsible, humanistic, and concerned with the welfare of others. They usually express themselves well and get along well with others; they like attention and seek situations allowing them to be at or near the center of the group. They prefer to solve problems by discussions with others, or by arranging or rearranging relationships between others; they have little interest in situations requiring physical exertion or working with machinery. Such people describe themselves as cheerful, popular, achieving, and good leaders. They prefer occupations such as school superintendent, clinical psychologist, high school teacher, marriage counselor, playground director, speech therapist, or vocational counselor. This is the social theme, or S-theme.

E - theme: The extreme types here have a great facility with words, which they put to effective use in selling, dominating, and leading; frequently they are in sales work. They see themselves as energetic, enthusiastic, adventurous, self-confident, and dominant, and they prefer social tasks where they can assume leadership. They enjoy persuading others to their viewpoints. They are impatient with precise work or work involving long periods of intellectual effort. They like power, status, and material wealth, and enjoy working in expensive settings. Vocational preferences include business executive, buyer, hotel manager, industrial relations consultant, political campaigner, realtor, many kinds of sales work, sports promoter, and television producer. The word enterprising summarizes this pattern of interests, thus E-theme.

C - theme: Extremes of this type prefer the highly ordered activities, both verbal and numerical, that characterize office work. They fit well into large organizations but do not seek leadership; they respond to power and are comfortable working in a well-established chain of command. They dislike ambiguous situations, preferring to know precisely what is expected of them. Such people describe themselves as conventional, stable,

well-controlled, and dependable. They have little interest in problems requiring physical skills or intense relationships with others, and are most effective at well-defined tasks. Like the E-theme type, they value material possessions and status. Vocational preferences are mostly within the business world, and include bank examiner, bank teller, bookkeeper, some accounting jobs, financial analyst, computer operator, inventory controller, tax expert, statistician, and traffic manager. Although, again, one word cannot adequately represent the entire theme, the word conventional more or less summarizes the pattern, hence C-theme.

Job List

The following jobs are organized using the personality-interest categories (R,I,A,S,E,C) that you have identified.

Realistic jobs (R) include skilled trades, technical, and some service jobs.

Investigative jobs (I) include scientific and some technical jobs.

Artistic jobs (A) include artistic, musical, and literary jobs.

Social jobs (S) include educational and social welfare jobs.

Enterprising jobs (E) include sales and managerial jobs.

Conventional jobs (C) include office and clerical jobs.

There are a few combinations of categories that do not occur at all. In these cases, use a two-letter rather than a three-letter code.

Realistic Jobs

(RIA)

Landscape architect
Architectural drafter
Dental technician
Darkroom technician

(RIS)

Forester
Industrial arts teacher
Radio operator
Electrician
Jeweler
Tool and die maker
Glazier
Baker
Cook
Filling station attendant
Optician
Welder
Offset press operator

(RIE)

Automotive engineer
Mechanical engineer
Mining engineer
Building inspector
Aircraft mechanic
Air traffic controller
Automobile mechanic
Watch repairer
Boilermaker
Drafter

(RIE, cont.)

Farmer
Line installer-repairer
Machine repairer
Machinist
Maintenance worker
Millwright
Plumber
Radio repairer
Automobile service adviser
Computer service technician
Diesel mechanic
Electronic technician
Farm equipment mechanic
Flight engineer
Shipfitter
Sheet metal worker
Automobile body repairer
Engraver, machine
Heavy equipment operator
Roofer
Upholsterer
Logger

(RIC)

Automobile parts counterworker
Load checker
Stone cutter
Turret lathe operator
Elevator mechanic
Locksmith
Nuclear reactor technician

Objective 4

Realistic Jobs (Cont.)

(RIC, cont.)

Nursery manager
Tree surgeon
Piano tuner
Switchman
Assembler
Drill press operator
Dry cleaner
Inspector
Printer
Shipping-receiving clerk
Structural steel worker
Tire builder
Shoe repairer
Teamster
Groundskeeper

(RAI)

Compositor (typesetter)
Bookbinder

(RSE)

Blacksmith
Fireman: locomotive
Railroad conductor
Barber
Butcher
Detective
Coal equipment operator
Fire fighter
Streetcar operator
Taxicab driver
Chauffeur
Waitress/waiter
Soda fountain clerk
Laborer, guard, janitor
Parking lot attendant

(RSC)

Bill collector
Exterminator
Elevator operator
Stock clerk
Kitchen helper

(RSI)

Vocational agriculture teacher
Appliance service worker
Weaver
Knitter

(REC)

Launderer

(REI)

Shop/plant supervisor
Ship officer
Track layer

(RES)

Fish and game warden
Gas station manager
Railroad engineer
Cattle rancher
Crater and packer
Railroad brakeman
Fisher

(RCI)

Surveyor
Motion picture projectionist
Office machine service worker
Carpenter
Painter (house, building, equipment)

(RCS)

Installer repairer
Tailor
Asbestos and insulation worker
Tile setter
Blaster
Bricklayer
Bus driver
Cement mason
Dressmaker
Furnace installer
Garment cutter
Mail carrier
Meter reader
Miner
Sailor (seaman)
Paperhanger
Plasterer
Sewage plant operator
Industrial truck operator

(RCE)

Crane operator
Grader
Truck driver

(RCE, cont.)

Tractor operator
Fork lift operator

Investigative Jobs

(IAS)

Economist
Mathematician, statistician
Marketing research worker

(IAR)

Anthropologist
Astronomer
Pathologist
Physicist
Chemist

(ISC)

Mathematics teacher
Production planner
Medical-laboratory assistant
Television repairer

(ISR)

Biologist
Osteopath
Dentist
Chiropractor
Natural science teacher
Optometrist

(ISA)

Physician
Psychiatrist
Experimental psychologist
Medical technologist

(IES)

Bacteriologist
Physiologist
Pharmacist
Research analyst

(IEC)

Actuary

(ICR)

Quality control technician
Computer operator

(ICR, cont.)

Research assistant
Radiation monitor

(IRA)

Geologist
Surgeon
Urban planner
Meterologist
Weather observer

(IRS)

Agronomist
Soil conservationist
Animal scientist
Botanist
Dairy technologist
Horticulturist
Natural scientist
Oceanographer
Zoologist
Biochemist
Engineer aide
Veterinarian
Geographer
X-ray technician
EKG technician

(IRE)

Administrator, engineer
Aeronautical engineer
Chemical engineer
Civil engineer
Electrical engineer
Metallurgical engineer
Test engineer: aircraft
Engineer
Chemical laboratory technician
Radio or television engineer
Metallurgist: assistant

(IRC)

Airplane navigator
Computer programmer
Tool designer
Model maker
Airplane pilot
Engineering technician
Instrument repairer
Laboratory technician
Tester: electronic systems

Objective 4

Artistic Jobs

(ASE)

Drama coach
English teacher
Journalist/reporter
Drama teacher
Dancing teacher
Foreign language interpreter

(ASI)

Writer
Philosopher
Art teacher
Literature teacher
Music teacher
Musician
Orchestra leader
Artist
Technical writer
Advertising copywriter
Commercial artist

(AES)

Advertising executive
Advertising manager
Entertainer (dancer, singer)
Public relations person
Fashion model

(AIS)

Editor
Dramatist
Actor/actress
Designer
Interior decorator
Critic (reviewer)
Fashion illustrator
Furniture designer
Jewelry designer
Furrier
Women's garment designer

(AIE)

Decorator

(AIR)

Architect
Photographer
Photolithographer

(AIR, cont.)

Sign painter/letterer
Photograph retoucher

Social Jobs

(SEC)

Director: social service
Compensation advisor
Dormitory director
Employment interviewer
Funeral director
Hotel manager
Job analyst
Chamber of commerce executive
Employee benefits approver
Food service manager
Bartender
Host/hostess (hotel, tearoom, etc.)

(SER)

Claim adjuster
Production expediter
Health and welfare coordinator

(SEI)

Educational administrator
Hospital administrator
Training director
Environmental health engineer
Historian
History teacher
Home service representative

(SEA)

Community recreation administrator
Employment counselor
Foreign service officer

(SCE)

Recreation director
Business agent: labor union
Executive housekeeper
Public health service officer
Theatre manager
Caterer
Liquor store manager

(SCE, cont.)

Restaurant proprietor
Ticket agent
Bellhop

(SRI)

Extension agent

(SRE)

Athletic coach
Physical education teacher
Building superintendent
Housekeeper
Occupational therapist
Governess
Driving instructor
Athlete
Houseparent
Police officer

(SRC)

Hospital attendant

(SIA)

College professor
Political scientist
Clinical/counseling psychologist
Social scientist
Sociologist
School counselor
Professional nurse
Social worker
Group worker
Adult education teacher
Rehabilitation counselor

(SIE)

Principal
Personnel director
Nutritionist
Dietitian
Inspector, public administrator
Customs inspector

(SIC)

School superintendent
Food and drug inspector
Politician
Social science teacher

(SIC, cont.)

YMCA physical director
YMCA secretary
Parole officer

(SIR)

Podiatrist
Inhalation therapist
Physical therapist
Therapist
Surgical technician

(SAE)

Counselor
Home economist
Homemaker
Home economics teacher
Elementary teacher
Foreign language teacher
High school teacher
Speech teacher
Pre-school/kindergarten teacher
Vocational/educational counselor
Teacher
Social service aide
Teacher aide

(SAC)

Cosmetologist
Embalmer
Hair stylist
Physical therapy assistant
Manicurist

(SAI)

Minister/priest/rabbi
Librarian
Special education teacher
Speech and hearing clinician
Medical record librarian
Dental assistant
Dental hygienist
Licensed practical nurse

Enterprising Jobs

(ECI)

Banker

Objective 4

Enterprising Jobs (Cont.)

(ECS)

Credit analyst
Grain buyer
Insurance underwriter
Real estate appraiser
Buyer (purchasing agent)
Real estate sales agent
Supervisor: ticket sales
Farm equipment dealer
Florist (dealer)
Art goods dealer
Furniture dealer

(ERI)

Industrial engineer
Farm manager
Contractor

(ERS)

Warehouse manager

(ERC)

Postmaster

(EIS)

Sales engineer

(EAS)

Lawyer, judge, attorney

(EAR)

Radio/television announcer

(ESC)

Administrative assistant
Branch manager
City manager
Director, industrial relations
Employment interviewer
Government official
Insurance manager
Manager/administrator
Manager: restaurant/bar
Personnel assistant
Personnel manager
Personnel recruiter
Production manager
Salary and wage administrator
Sales manager

(ESC, cont.)

Traffic manager
Business manager
Labor arbitrator
Office manager
Customer services manager
Apartment house manager
Insurance investigator
Demonstrator
Dispatcher: motor vehicle
Peddler (huckster)
Sales clerk
Hotel clerk
Salesperson

(ESR)

Automobile salesperson
Sporting goods salesperson
Route salesperson

(ESI)

Director: administrative services
Systems analyst: business EDP
Wholesale dealer
Life insurance sales agent
Manpower adviser
Automobile dealer
Gift shop manager
Grocer
Manufacturer's representative
Retail merchant
Shoe store manager

(ESA)

Securities sales agent
Guide: travel
Salesperson: photographic equipment and supplies
Flight attendant

Conventional Jobs

(CRI)

Timekeeper
Linotype operator
Biller
Key punch operator
Tabulating machine operator
Duplicating machine operator

(CRS)

File clerk

(CRE)

Sewing machine operator
Instrument assembler

(CIS)

Certified public accountant
Time study analyst
Bookkeeping machine operator
Foreign trade clerk
Calculating machine operator
Accounting/statistical clerk
High-speed printer operator
Bank clerk

(CIE)

Office worker
Payroll clerk
Proofreader

(CIR)

Accounting machine operator
Office machine operator
Telegraph operator

(CSE)

Business commercial teacher
Personnel clerk
Sales correspondent
Travel bureau clerk
Receptionist
Telephone operator
Teller
Typist

(CSR)

Reservations agent
Traffic checker
Messenger

(CSI)

Bookkeeper
Cashier

(CSA)

Secretary
Medical secretary
Library assistant
Order clerk
Religious affairs clerk

(CER)

Data processing worker
Mail clerk

(CEI)

Finance expert
Personnel secretary

(CES)

Accountant
Credit manager
Clerk
Court reporter
Stenographer

OBJECTIVE 5—Participants will know about how to apply for financial assistance and veterans benefits.

Learner Outcomes

Participants will be able to:

- Describe the major kinds of financial aid available
- Describe the veterans educational benefits available
- Explain the criteria in awarding financial aid and veterans benefits
- Identify the financial aid and veterans counselors at educational institutions
- Outline and discuss the procedures to apply for financial and veterans educational assistance

Number of Sessions

One to two

Instructional Techniques

Lecture, group discussion, demonstration, audiovisual

Location

Educational institutions

Strategies and Activities

- The financial aid and veterans counselors should review and discuss the major kinds of financial aid and veterans educational benefits available to workers.
- Have the trainees work in pairs to complete a financial aid application. Then have a financial aid counselor review one of these completed applications on an overhead projector. The financial aid counselor should indicate the kinds of financial aid for which this person would qualify.
- Have the trainees complete a veterans educational benefits application and then have the veterans counselor review one with the trainees highlighting what he or she is looking for.

Suggestions for the Trainer

Much federal and state financial aid will not apply to adult workers. Have the financial aid counselor highlight the financial aid programs that are applicable. Short-term loans to pay for tuition or staggered tuition benefits are important to review. In some instances, if there is not this kind of assistance, the worker will not enroll in courses. Many workers may be veterans. It is important to discuss the status of their eligibility and the effect veterans assistance may have on their tuition refund program eligibility. Delayed or incremental tuition payment plans should be explained in detail. Do not forget tuition grants and scholarship programs, since workers may be eligible for certain kinds of grants.

Handout Materials

- Financial aid brochures
- Veterans information brochures
- Financial aid application forms
- Veterans educational benefits application forms
- Sample financial aid award and rejection letters
- Sample veterans assistance award letters

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OBJECTIVE 6—Participants will become familiar with admission and registration procedures of area postsecondary educational institutions.

Learner Outcomes

Particpants will be able to:

- Outline and explain the procedures in applying for admission to postsecondary institutions.
- Complete admissions forms
- Read postsecondary institutional master schedules
- Outline and explain the procedures in registering for courses in postsecondary institutions
- Complete registration forms

Number of Sessions

Two to three

Instructional Techniques

Lecture, group discussion, field trips

Location

Educational institution

Strategies and Activities

- Have an admissions representative review the steps in applying for admission to one of the local postsecondary educational institutions.
- Take the trainees to the admission area, show them the physical location, and review the steps in applying for admissions again. Discussion should be encouraged during this presentation to highlight major differences with other educational institutions' admissions procedures.
- The same method should be used when reviewing registration procedures including the master schedule.
- Discussion should take place concerning ways the study organizer can help workers apply for admission and register for courses.

Suggestions for the Trainer

The trainees should be led through both the admissions and registration procedures at an educational institution. Be sure to emphasize to the trainees that an effective place to enroll workers in courses is in the workplace and at union meetings. This provides a face-to-face situation that is a positive and effective way to have workers apply for admission and enroll in courses of their choice. Include reviewing the procedures for veterans benefits and financial aid. This is time consuming and for some may be familiar, but it will reinforce what the trainees will have to know in advising workers. If representatives from other educational institutions are at this session, they should discuss how their procedures may differ. However, it is important not to provide so much information that it will be overwhelming. Since this step is the key to actual enrollment, two to three sessions should be considered.

Handout Materials

- Steps to apply for admission
- Admissions materials
- Steps to apply for registration
- Catalogs
- Master schedules
- Registration materials

OBJECTIVE 7—Participants will know how to use advising and counseling techniques.

Learner Outcomes

Participants will be able to:

- Understand the verbal and nonverbal communications processes
- Use questioning and listenting skills in advising workers
- Use decision-making skills in advising workers
- Use referral skills in advising workers

Number of Sessions

Two to three three-hour sessions

Instructional Techniques

Lecture, video playback, large group discussion, role playing

Location

Training site

Strategies and Activities

Session I

- The trainer should show a videotape illustrating faulty and effective advising techniques (Handout A).
- The trainer should present a didactic overview of communication techniques (Handout B).
- The trainer should focus on the use of effective questions. There should be a succinct discussion of questioning as a technique that can be adapted to the study-organizer role (Handout C).
- The trainer should discuss nonverbal communication strategies with the group.
- The participants should be given an opportunity to practice some of the skills to which they have been exposed (Handout D).

Session II

- The trainer should begin the session with a brief overview of the advisory materials, e.g., college admissions forms, catalogs, and study-organizer intake form (Handout E).
- On videotape, a trainee plays a potential client, while another trainee plays a study organizer (Handout F). The other participants should observe the role playing via a television monitor. The segment is taped for playback later in the session. The procedure is repeated for each participant. The trainer might want to use the following instructions.

  To the trainee playing the client: You are a fellow worker coming in for information about using the tuition refund program for training in mechanical engineering (or data processing or office practice).

To the trainee playing the study organizer: Listen carefully and take your time in responding to your client, you are not expected to use all of the skills we have covered. There are no "right" and "wrong" answers. When we view the tape later, we will be looking for your own particular adaptation of the materials to this situation.

- After each participant has had the opportunity to role play, the segments should be viewed by the entire group. Techniques and particular problems should be openly discussed with participants whose segments are not being viewed at the time offering suggestions as to how they would handle the situation.
- Role-playing practice in the use of the telephone should be given to the trainees using the intake form (Handout C) as a guide for interview material. The interview should be videotaped as previously suggested.
- Time should be devoted to questions and concerns of the participants.

Suggestions for the Trainer

The advising and counseling techniques should be presented after the participants have received accurate, comprehensive information about the tuition refund program. The trainer should clearly indicate to the trainees that although they are indeed peers of their "clients," in their roles as study organizers they are advisers to their co-workers.

Advising techniques. In advance of the first training session, the trainer should prepare a videotape consisting of two 10-minute segments. The first segment should illustrate faulty advising techniques; the second, with the same "counselor" and "client," effective techniques (see Handout A which contains an annotated transcript of such a tape). This tape is viewed at the opening of the training session and serves as a springboard for discussion. Allow participants to identify what they consider to be effective methods of advising and why.

A trainer should realize that adult workers-as-students require a different kind of advising than is most effective with the "traditional" student, who may be defined as one who has made the transition from a secondary to postsecondary institution with little or no significant "break" in the process. With traditional students, an adviser uses nondirective, passive techniques to encourage them to become independent, make decisions, and seek out personal solutions to potential problems that may occur after leaving college. In the case of the worker-students, the emphasis has to be upon nondirective advising in the initial stages of a meeting with a study organizer. Nondirective advising, in this sense, involves greeting a worker, explaining the tuition refund program, making the required educational information and materials available, answering questions as they come up, and generally making the worker feel at ease in a nonthreatening, relaxing communicative situation.

At the point where the worker indicates an interest in pursuing education, however, he or she is going to expect specific advice on an adult-to-adult basis. Such direct advising will conceivably involve answering such questions as the following:

1. What's in it for me? (Why should I be concerned about schooling?)
2. How can I fit school into my work and personal time schedule?

3. What happens if I get transferred to a different shift after I have enrolled in this program?
4. What assurances do I have of getting promoted if I do complete this schooling?
5. Are they going to try to teach me the same way they did when I was in high school? (If so--forget the entire thing!)
6. What course do I take? What do you (the study organizer) suggest?
7. Where do I go to get registered at this college?
8. Who do I see there to help me? (Adviser or counselor?)
9. If I take the courses I've selected and get my degree and there are no advancement opportunities where I'm working, what options do I have?

In adult-related advising, the counselees come from a decision-making environment, are more apt to be capable of making final decisions at the proper time, and approach the advising situation on a peer-group basis. They fully demand and expect satisfactory answers to their questions so that they can make their own decisions based upon sufficient feedback from the adviser about a variety of experiential probabilities. Therefore, when adult workers ask some direct questions about the many and varied aspects of education as it may affect their lives, they expect direct answers, discussions of options and tenable alternatives, and sound advice from the adviser.

Didactic overview. The didactic presentation of communications techniques should be a theoretically based model with which the trainer is comfortable. A suggestion is presented in Handout B, an adaptation of Carkhuff's model (Patterson, Relationship Counseling and Psychotherapy, pp. 54-55.) A theoretical review of this model highlights the following progression from a low-empathic to a high-empathic possible response on the part of the study organizer.

Level 1: The study organizer communicates no awareness of the obvious, expressed feelings of the client.

Level 2: The study organizer communicates some awareness, but the nature of the response dilutes the feeling level and often de-emphasizes the level of meaning the client is trying to convey.

Level 3: The response of the study organizer closely resembles, and is often interchangeable with, the affect and meaning of the client. It does not detract from the feeling, but makes no attempt to go to a deeper level of meaning. This level, however, is recognized as the minimal level for effective interpersonal communication. Trainers should attempt to bring the trainees to an awareness of, and modeling of, this level during the course of the training sessions.

Level 4: The study organizer attempts to add to the verbal expressions of feeling, at a level deeper than the client is able to express.

Level 5: At this level, the response of the study organizer encourages the client to an ongoing process of self-awareness and expression. It is highly recommended that study organizers not try to force their helping role to the Level 5 stage. The skills and commitment involved in such self-awareness counseling do not fall within the role of the study organizer.

Additional Points:

1. Allow no one but potential study organizers to attend the sessions.

An exception would be technical personnel for videotaping. Well-intentioned observers do not take training material seriously and can be a distraction.

2. Realize that you will not be able to cover everything in depth. However, do not let yourself become sidetracked by free-floating questions and examples. Be firm and let the study organizers know you have a task to achieve. Build in a definite time for participant reaction and repartee during the last 20 minutes or so.

3. When making the sample videotape for session one, try to play the counselor yourself. It will help to personalize the material you present.

4. If your background is in the behaviorial sciences, you will experience some "culture shock" with the transfer to a technical or clerical setting. Remember, however, that the skills you present are basic to every communication interaction. The participants will accept what you have to offer if the examples you use are adapted to meet the needs of the clients they are to serve.

5. Nonverbal communication and its interpretation can be overemphasized and misused by trainees caught up in their new roles as study organizers. It should be noted when appropriate, but keep in mind that you are training supportive peers who can give accurate information and referrals--not "instant clinicians."

6. Industrial workers have the unique advantage of easily identifying with their clients. They are aware of the points of reference used by their clients (e.g., shifts, crew chief, section supervisor). The added positive personal self-image in being identified for this role helps to minimize the feeling of inexperience. The enthusiasm and good will of this group can compensate for the lack of sophistication in theoretical background.

7. Be supportive, especially during the taping segments. The trainer should realize that this is a new experience for most trainees. You should be firm, yet not overwhelming, when critiquing obviously weak areas in the tape. When possible, ask a trainee to give other responses or modes of behavior that could be used in place of the one being evaluated.

Handout Materials

- Effective and Faulty Advisory Techniques (A)*
- Communication: Levels of Understanding and Responding (B)*
- The Use of Questions (C)*
- Sample Client Statements for Audiotaping (D)*
- Sample Study-Organizer Intake Form (E)*
- Sample Interview (F)*
- 31 Reminders for Effective Advising of Co-workers (G)*

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Objective 7

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Faulty and Effective Advisory Techniques (A)

The following is a transcript of a videotape training lesson. Ideally, the study organizer (S) should be played by the trainer. Segment I illustrates less effective advisory styles; Segment II, interactions that are more effective. Please note that this is a transcript and therefore the reader does not have the advantage of viewing the nonverbal cues in this interaction.
S = Study organizer
W = Worker

Segment I

S: In the first part of the tape I am going to show counseling and advising techniques that are not very helpful. I am unsure of the information, hurried, not very precise in answering questions. After a few minutes of this behavior, I then try to listen better, try to let him know I am here to help him.

W: Good morning.

S: Good morning, Ralph.

W: I would like to speak to you this morning about going back to school. I know you have all the information. I am ready to go back to school. The union has been nogotiating things I want to take advantage of. I enjoy working here, I feel I can get further ahead, my interest is electrical or mechanical engineering. I've gone through high school. I had problems with math. Now I don't know if I am ready to get back into this going-back-to-school.

S: And as a part of the package by the union you know you can use it to go somewhere and take some courses in different places and the courses could help you. You might learn some other stuff; you might like them; you might get a degree.

[Note the vagueness and the study organizer's avoiding the lack of confidence on the part of the worker.]

W: Do I have to pay for them, what is the process?

S: Well, um, I'm not too sure. First I think you pay them. Perhaps you might see someone in the personnel office or just talk to the people at the college. You said that you were not too good in math in high school.

[Note the rambling and jumping from topic to topic, i.e., payment, personnel, high school math.]

W: No, but I have been working and doing some practical application. I thought that would help me.

S: Yeah, gee, I guess you are going to have a hard time at college if you don't know math.

[Note the "putting down" tone of the response. Avoid!]

W: Yeah, but with my job I have to use math. I thought I might be picking up skills that would get me in. Who else can I talk to about it besides you?

[Note how worker seems to pick up uncertainty of study adviser.]

S: Well let's see, they told us that there was this guy at the college. He is sort of a middle-sized, wavy-brown-hair guy in the admissions office. Just stop by there, he can tell you everything and give you the papers you need, and you know you can do that.

[Too vague--exact names should be used.]

W: What side of Hagerstown is that on?

S: Yeah, you use route 40 east--it is off of Robinwood Drive and you drive in. There are lots of parking lots and just park in any lot and ask anybody where the admissions office is.

W: Oh, great.

S: Yeah, well when did you want to start?

W: Well, it is summer. I thought maybe they had summer courses.

S: Yeah, I thought they had summer courses but I am not sure if it is the same thing they do during the year. This guy in the admissions office--he will know it all.

W: Am I going to have any problems because of shift work? Do they have night classes? Do you have all that information?

S: Well they have night classes ok, and um, I don't know what times--what shift do you work?

W: Well, 8:00 now. If they have courses I will have to find out when they will be and work my hours around it. I don't know if it will be the same all summer, depends on the time period.

S: Your best bet is to talk to someone out there.

[Note that this entire segment lacks resolution and direction because the study organizer lacks precise information and does not show support.]

Segment II

S: Ralph is now going to ask for the same information. I will try to be more helpful and precise. If the most you can do as a study organizer is to provide precise, accurate information, you will have done a great deal for this person.

W: Good morning.

S: Good morning Ralph.

W: I know there are benefits that the union offers. I am interested in going back to school and picking up some courses. I have been working here long enough, using math skills. I was hoping to get back into mechanical or electrical engineering. What do you know about classes around Hagerstown?

S: Do you live in the Hagerstown area?

W: Yes.

S: You can easily commute either to the Career Studies Center or to the Junior College?

W: No problem. I have not been to the Junior College but have been to the Career Studies Center.

S: Since you have a high school diploma, I think the best thing you can do is make a visit to Hagerstown Junior College, talk to several people out there. If you are not sure of your skills in math or science, and you want to get into physics, science or math, you'll probably want to take some tests.

W: Exactly.

S: There are two programs Hagerstown Junior College has as a suggestion and good place to start--mechanical engineering technology and electrical engineering technology; they also have a program that combines the best of both of them.

W: Oh, really?

S: Um hum, what you can do is take a particular set of courses that will help you in your job like machine design, or stress of materials. All of these courses would mean you need math preparation. A good place to start is one of the counselors at Hagerstown Junior College.

W: Do you know any of the counselors? I have not been on campus before.

S: The person I want to refer you to is Dan Jones. I want to give you a copy of the Hagerstown Junior College catalog, and I will write his name and extension on it. Then you can start off with him. There is no commitment. He can set up some tests in reading, English, and math. If you need some math brush-up you might start off with a math course first, then you get into the other material. He will tell you what paper work to do.

[Note the difference in the quality of information as compared with Segment I.]

W: Ok.

S: Paper work at the Junior College is pretty simple; you need a high school transcript.

W: Oh, my high school transcript. Where do I go to get it?

S: A transcript is a copy of your records; phone your high school principal or stop by there. Where did you go to high school?

W: South High.

S: I suggest you stop by and see Tim Roberts in the guidance office or call South. They will send your records directly to the college.

W: Oh, great.

S: Since you have been out of school for a while, you will probably not have to take an admissions test. (Shows college catalog.) The application is in the back of this book. It is pretty simple, but you can check with Mr. Jones if you are not too sure of the answers to any of the questions or come back and see me. Let's just look at one of the programs in here--perhaps one you might be taking--let's look at Electrical Engineering Technology (gives copy of catalog to W.).

W: Oh, great.

S: If you look through that you will see the courses spread out over two years. If you are going to work and go to school, you will probably go part time.

W: Yes, absolutely. I would have to do it that way.

S: You can go as long as you want to.

W: How do I pay for it? What is the process? After I talk to the counselor, how do I let people in personnel know?

S: There is a very simple form to complete after you decide what you are going to take. Then give the form to me. Since the program is new, we are not sure yet whether you will have to pay early in the semester and then it will be reimbursed to you. We will have all the forms on record, and as soon as we have a few more meetings, we will get back to those who are interested. You will know then what you should do.

W: The only other thing I can think of is, if I could meet some of the faculty so I can get a better understanding of what some of these courses are, I could see what I might want to take. I wonder if I need all of them.

S: I would suggest that you make an appointment to talk to Mr. Jones; his office is in the Career Programs Building on campus (gave directions). I will give you a list of important people at the college and his name appears on the list. Tell him you are concerned about talking to the person who is involved in teaching the courses. They did tell us when we were out at the college that because of experience some people might not have to take some of the courses. However, I cannot give you a good reading on that.

W: That is the thing I am concerned about because I do see a couple of electives that cover things I work with all the time; maybe I could skip them.

S: That might be true, but I am not too sure.

W: I feel better about this, but if I have more questions can I get back to you?

S: Ok, but the first thing I think you should do is make an appointment to see Mr. Jones, the counselor at the college. If he does not answer all the questions about the money, come back and see me.

W: Anything else you can think of?

S: Are you a veteran? You might want to use your VA benefits.

W: No.

S: One of the first things to realize about going back to school is there are other guys at the company who came to see me. There will be a lot of you in the same classes; you might get together in study groups and be able to help each other. If there is anything with your schedule you're not too sure about, stop by and check with me. If I don't know the answer, I will put you in touch with someone on campus who does.

W: Oh great, I really appreciate it.

S: Thanks for coming in.

W: Thank you.

Communication: Levels of Understanding and Responding (B)

Example I.

Potential Student: I'm a little uncertain about going to school. You know, it's been a while since I've hit the books.

Level 1: Isn't listening, takes away from what is being said.

"Yes, you will be at a disadvantage with the younger kids with that rusty thinking cap."

Level 2: Tries to tone down what is being said.

"All older people feel that way. You'll get over it."

Level 3: Expresses what is being said in slightly different words or phrases.

"You're a little scared and wonder what classes will be like."

Level 4: Tries to get at the real message.

"It's not going to be easy at first, especially since it's been a few years and you wonder if you'll be able to handle it."

Level 5: Uses the first person and speaks for the other.

"I'm not too sure I can get back to the books after such a long time being away."

Example II.

Potential Student: You've given me this catalog but it's like Greek.

Level 1: Isn't listening, takes away from what is being said.

"Well if you just pay attention for the next few minutes, I will show you how easy it is to read."

Level 2: Tries to tone down what is being said.

"Don't worry about it, that stuff isn't too important anyway."

Level 3: Expresses what is being said in slightly different words or phrases.

"The first time you get something new, it takes a while to understand it."

Level 4: Tries to get at the real message.

"You're really wondering if you'll be overwhelmed with the kind of stuff described in that book."

Level 5: Uses the first person and speaks for the other.

"You're saying to yourself, good God what does all this stuff mean?"

Example III.

Potential Student: I really want to go back to school, but I have two young children and my husband works, and I don't want to neglect my responsibility to my family.

Objective 7

Level 1: Isn't listening, takes away from what is being said.

"Tough bananas, everybody will have to adjust when you go to college."

Level 2: Tries to tone down what is being said.

"Just talk to Janet Brown in your work area; she has been taking classes for two semesters and might be able to give you some advice."

Level 3: Expresses what is being said in slightly different words or phrases.

"It's pretty hard to make decisions for yourself that will also affect your husband and children."

Level 4: Tries to get at the real message.

"After being a mother-worker, you're wondering if it's fair to your family for you to be taking a few hours more from home time to take that computer course."

Level 5: Uses the first person and speaks for the other.

"I wonder if some of your thoughts right now might not be dealing with whether or not it would be selfish of you to want to do something for yourself and how all of this might put a strain on what now is a pretty smoothly running home."

*The Use of Questions (C)**

A. Some general considerations

1. Be aware that questioning is going on
2. Challenge the questions and weigh carefully their desirability
3. Examine various types of questions and those we personally tend to use
4. Consider alternatives to asking questions
5. Become sensitive to questions asked by client

B. Types of questions

1. Open vs. closed
   "How did you feel after the game?"
   "You felt great after the game, didn't you?"
   Open is the preferred.

2. Direct vs. indirect
   "You've been here a week now. What do you have to say for yourself?"
   "You've been here a week now. There must be a lot you want to talk about."
   Indirect is preferred.

3. Double questions
   Study organizer: "Are my questions helpful, and are you learning more about yourself?"
   Worker: "I can't really say."

4. Bombarding--series of questions which make the interview an evaluative session and should be discouraged.

5. "Why...?" Such an opening sets up an "interrogation" mood and should be discouraged.

C. When to use questions

1. To clarify things for the study organizer
2. To check whether things are clear to the worker
3. To direct a worker into further exploration of a thought or feeling

*From: A. Benjamin, The Helping Interview. Boston: Houghton Mifflin, 1969.

Sample Client Statements for Audiotaping (D)

Respond to these statements:

1. Would you take advantage of this program if you were me?
2. How will this help me get ahead in life?
3. I bet I'll be the oldest person in my class.
4. This is going to take more time than I thought; I don't think I'll go to school.
5. Where can I get more information about office-practices courses?
6. I had math in the army; must I take the stuff again?
7. Who else in my section will be going to school?
8. My wife (husband) says I spend little enough time at home as it is--I'm not sure I can go to class.
9. There's nobody to take care of the kids if I go to school.
10. Why take courses for credit when I don't intend to get a college degree--seems like a waste to me.
11. My English very poor...no can read well. Is school ok for me?
12. The kids play the stereo and television and my wife (husband) yells. Our house is too noisy to study.

Sample Study-Organizer Intake Form (E)

Meeting Date_____

Study Organizer_____

Name_____ Badge Number_____

Address_____
Street Town Zip

Telephone_____
Area Code Number

Shift: 1 2 3 4 Veteran: Yes___ No___ High School: Diploma___ GED___

How did you find out about the SOC (bulletin board, mail, co-worker, management publication, or specify other source of information)?

_____

_____

_____

PURPOSE IN COMING

A. Education Information (information about education, admissions, brush-up, high school GED, 2-year college offerings, 4-year college offerings, vocational, other)

_____

_____

_____

B. Tuition Refund Plan (application procedures, eligibility, applicable courses/programs)

_____

_____

_____

Objective 7

C. Career Planning (assessing skills in current job, increasing skills for promotion, exploring careers, general career counseling)

_____

_____

_____

Action taken:

_____Reviewed area educational opportunities

_____Gave and reviewed education catalogs

_____Gave and reviewed tuition refund program procedures

_____Gave and reviewed tuition refund application

_____Referred to section manager of training for_____

_____Set up an appointment with a counselor at_____

_____Gave and reviewed admissions application for_____

_____Other_____

_____

Comments:

_____

_____

_____

Sample Interview (F)

The following is an edited transcript of a study-organizer practice tape. The individual playing the worker is a person involved in consultation with the project. The trainee is playing the study organizer. Please note that this is a transcript and therefore the reader does not have the advantage of viewing the nonverbal cues in this interaction.
W = Worker
S = Study organizer

W: Hi, George.

S: Good evening, Fred.

W: Listen, I received this information in the mail; I have not read through it very carefully, as a matter of fact. Some of the other fellows said they received it.

S: We sent out 3,800 of them.

[This is an irrelevant response.]

W: 3,800, tremendous!

S: When did you get yours, yesterday?

W: Yesterday. I thought maybe you could help us.

S: We are pretty new, I don't have all the answers. Being smart is not having the answers, but knowing where to get them. What is your first question?

W: Well, um....

S: What are you interested in primarily?

[Study organizer interrupts, does not allow worker to complete his thought --a poor technique.]

W: The questionnaire that was sent out....

S: Yes?

W: Some of the fellows have trouble with it.

S: What with filling it out or something else?

W: Well, some of the questions. They were not sure how to complete them.

S: Do you want to go over it quickly?

W: Before this mailing, did you know about the tuition refund plan?

S: Did you?

W: I guess that would reflect the questions the other fellows had.

S: Most of them did not know it existed.

W: We had heard something about it. What does the tuition refund plan do?

S: Well, for the most part if you pick up a course at the junior college or any other college, that is--a course approved by the company--they will underwrite the cost.

W: What do you mean approve?

S: Not each course is approved by the company, for example, biology, cosmetology, hairdressing. They are not job-related. If they are not, the cost will not be underwritten by the company. If you have proof of payment and successful completion, the company in turn will reimburse you. It's that simple.

W: It sounds fair enough.

S: Most of our people are not taking advantage of it. That is the complaint of the union, and I understand the junior college would like to have more students--the union having negotiated this. It is just like a week's vacation.

W: Why not take advantage of it?

S: Not using it is like throwing away a week's vacation benefit. We know full well maybe they (the workers) need an urge to do it. We need to give it to them, because many of these 3,800 are old or have a poor educational experience and don't want to improve. They are not interested at all based on the 103 cards I received, that is, 103 out of 3,800. They are just not interested. When a man can make $20,000 and up, why should he go to college? He can make that without putting himself out!

W: Yeah, but there are some of us that would enjoy taking a crack at it. There are things going on at the plant that might call for more information. For instance, I am a coordinator in charge of material control and keeping track of things. There are also some other jobs with more benefits. If I could find out what education is needed, I could qualify for those.

S: You're absolutely right. Because I notice the higher up you go, the easier it is. With coordinator's work, if you go a little higher by means of a better education in the plant, it might not be the worst thing in the world that might happen.

W: You know me pretty well. What kind of a job appears up the ladder?

S: A PR man of some sort.

W: A PR man, thanks.

S: Yeah, but we have one already.

W: What makes you think I would make a good PR man?

[The last few exchanges show the study organizer losing control of the session.]

S: I'll tell you this, you can know what you are already able to do. If you don't know what slot you can fall into, go out to the junior college and see Marie Brown or the counseling services they offer and see if they could steer you on the right road--the road that would have the greatest benefit with the least wear and tear.

W: I guess they would want to see my high school record or whatever?

S: Not necessarily the first time around. After you are out five years, they don't worry about high school records. One of the nicest things you can do for yourself, if you don't know what you want, is to see Marie or one of her cohorts and find out what the junior college has to offer with what you already have and what you want to know.

[This response, although lengthy, is reassuring.]

W: That sounds good and....

S: I don't have the capability; I don't know what they have to offer, but they do, and it's all free, and that is the nice thing about it. The counseling would not take forever.

[Again, the study organizer interrupted.]

W: That is true; it has been 25 years since I have had any education.

S: But don't forget you have been a coordinator. You have done mathematics; you write letters....

W: Yeah, they say I put words together very well.

S: Yeah, you do put words together very well, and that is a distinct asset. You appear to have a good vocabulary. You have this going for you already. You might have to specialize in some particular area depending on how you want to further your knowledge.

W: How am I going to do this working the way I am, nights and weekends?

S: Well you are a coordinator, you know your hours, 7:00 a.m. in the morning you work straight till 4:30 sometimes 6:00 p.m., sometimes six days a week. The junior college offers evening classes. It takes a lot of energy to coordinate and go to school, but if you have the energy left, you can take a course for two hours (not longer than three hours). You can stretch it out over a period of time.

W: If they are paying for it...

S: Since they are paying for it, the most you are losing is some time and sleep, but it would be worth the try if you have the time.

W: Who do I see out there?

S: It is worth a call before you go out. If you want to I will make an appointment for you before you leave. Could you be available at most anytime? Evenings would be most appropriate, wouldn't they?

W: Evenings would be best, maybe around 7:30.

S: I will call right now. I will call the counselor and make the appointment. When you and they determine what is best for you, come back and see me.

W: Some of the other fellows are shy. I guess they are afraid to come in. They asked me to ask you about the questionnaire and what they can do to get involved. Some of them have not completed high school, and they wondered if there is something available for them at a lower level if they might have reading problems or they can't figure.

S: They have brush-up courses at the junior college. Lack of education is no barrier. Steer these guys to me. Just tell me who they are, give me their names and phone numbers.

W: They know you would not lead them wrong. I will encourage them to do that.

S: The only thing they have to do is call the union office. I will give you the number to give them. The clearinghouse will be the union office. The girls will say what a convenient time is to come.

W: Yeah, that would be good. The union hall is our turf and we feel comfortable there. I would feel pretty comfortable with the counselors out there at the college, but some of these other fellows might not be

S: Well, the counselors, if they are what the name implies, will make you feel comfortable.

[There follows a lengthy, chatty segment where no advising is being done.]

W: What about us older ones, sitting in the classroom with all those younger students?

S: I have heard about the lady 60 years old and she did it. People are embarrassed. I don't know how an older person could forget embarrassment unless they are outgoing.

W: I imagine they would have programs fcr people who are not interested in earning a degree.

S: Yes, Marie telis me they have hands-on vocational-type courses, masonry, carpentry, and so forth.

W: Well, listen, I think you have been very helpful.

S: Are you going to go out and see a counselor?

W: Yes, I will.

S: Let me know how you make out.

*31 Reminders for Effective Advising of Co-Workers (G)**

1. Care about co-workers as people by showing empathy, understanding, and respect.
2. Establish a warm, genuine, and open relationship.
3. Show evidence of interest, helpfulness, and involvement.
4. Be a good listener.
5. Establish a good feeling by remembering personal information about co-workers.
6. Be available; keep appointments.
7. Provide accurate information.
8. When in doubt, refer to available resources, e.g., college catalogs.
9. Know when and how to make referrals, and be familiar with referral sources.
10. Don't refer too hastily; on the other hand, don't attempt to handle situations for which you are not qualified.
11. Have your co-workers contact referral sources in your presence.
12. Keep in frequent contact with co-workers; take the initiative; don't always wait for them to come to you.
13. Don't make decisions for co-workers; help them make their own decisions.
14. Know when to provide direct advice.
15. Focus in on the co-workers strengths and potentials rather than their limitations.
16. Seek out co-workers in informal settings.
17. Monitor co-workers progress toward career and life goals.
18. Help identify reasons for poor academic performance and refer your co-workers to appropriate academic support services.
19. Be realistic.
20. Use all available information services.
21. Clearly outline co-workers responsibilities.
22. Follow up on commitments made to co-workers.
23. Encourage co-workers to consider and develop career alternatives when appropriate.
24. Keep a brief record of significant conversations for future reference.
25. Don't be critical of some institutions or resources to co-workers.
26. Evaluate the effectiveness of your advising.
27. Have some knowledge of resources to help co-workers identify career opportunities and job outlook information.
28. Encourage co-workers to talk by asking open-ended questions.
29. Categorize co-workers questions; are they seeking action, information, or involvement and understanding.
30. Be yourself and allow co-workers to be themselves.
31. Don't betray confidential information.

*Adapted from: Arlene Twedt, Gene Brown, and Evelyn Anderson, The LEAP Handbook. Des Moines, Iowa: Des Moines Community College, Labor Educational Advising Project, 1979, p.3.2c.

OBJECTIVE 8—Participants will know ways to overcome obstacles that may prevent a worker from enrolling in courses or completing a degree program.

Learner Outcomes

Participants will be able to:

- Identify and describe major obstacles to worker participation in education
- Suggest strategies to overcome obstacles to worker participation in education

Number of Sessions

One to two

Instructional Techniques

Lecture, group discussion, role playing

Location

Training site

Strategies and Activities

- The trainer should distribute the handout, "Strategies to Overcome Obstacles to Worker Participation in Education." Review each of the obstacles and strategies, and encourage the participants to add others that might apply.
- The participants should role play, citing obstacles in mock interviews with study organizers. Discussion should follow the role playing in order to clarify the strategies discussed before.

Suggestions for the Trainer

This session is one of the most important in the training program because the topics covered in it are those the study organizer can expect to be confronted with on a daily basis. Emphasis should be placed on reality and what is possible, rather than on "what if" or pure conjecture. The former is oriented toward problem solving, while the latter approach is oriented to problem causing and frustration. You can expect the major obstacles to fall in one or more of the categories in the handouts. The participants may wish to rank them in terms of what is most important for their constituency and add others as may be appropriate to their situations. Be sure to review the handouts on obstacles carefully before conducting this session, and read the literature listed under References for this objective.

Handout Materials

- Characteristics of Adult Learners*
- Strategies to Overcome Obstacles to Worker Participation in Education*

*Included in this volume.

References

Charner, Ivan, Kathleen Knox, Allen E. LeBel, Herbert A. Levine, Lawrence J. Russell, and Jane E. Shore, An Untapped Resource: Negotiated Tuition-Aid in the Private Sector. Washington, D.C.: National Manpower Institute, 1978.

Chudy, David. Western New York, UAW General Motors Tuition Refund Survey: A Descriptive Report. Buffalo, N.Y.: UAW, 1979.

Objective 8

*Characteristics of Adult Learners**

In considering adult learners, it is clear that there is a gap between two identifiable groups seeking educationally related services. One group is fairly well educated and generally education oriented. The other group has less education, yet often is interested in more learning, but needs help to get it.

Common characteristics of adults seeking educational assistance include the following:

1. People come for help because of dissatisfaction with their present situation. Any action to be taken involves change and is often accompanied by anxiety. They are often reactive rather than proactive in their approach to life.
2. Most people have had very little experience in career planning.
3. There is often a lack of willingness to take risks.
4. They have a conspicuous lack of accurate information about careers and other related information.
5. People with low incomes tend to have low informational skills and therefore depend heavily on information from acquaintances.
6. Adults are often in a hurry. ("I need to choose a career before I go to work in 15 minutes.")
7. They often have poorly developed skills for planning, setting goals and priorities, and making decisions.
8. Many sense they are or will be discriminated against because of age, sex, race, etc.
9. Many lack emotional support from family and friends in their efforts to make changes.
10. Many lack self-confidence. Some are embarrassed not to have a firm idea of what career they want. They often expect to be given direct advice about what to do.

*Adapted from: Arlen Twedt, Gene Brown, and Evelyn Anderson, The LEAP Handbook. Des Moines, Iowa: Des Moines Community College, Labor Educational Advising Project, 1979, p. 1a.

*Strategies to Overcome Obstacles to Worker Participation in Education**

Obstacle 1--The availability, location, and times of courses and enrollment procedures for these courses.

Study-organizer strategies:

1. Know the admissions and registration procedures of the local postsecondary institutions.
2. Have a list of the contact people at postsecondary institutions and call them when the worker is at the meeting to speak to them and make an appointment.
3. Have postsecondary admissions representatives speak to workers about applying for admission and enrolling in courses.
4. Have admissions and registration materials and literature available to give to workers.
5. Know what libraries and/or career information centers have more in-depth information and refer the worker to them.

Obstacle 2--Not knowing that credit may be granted for life experiences where appropriate to enable workers to meet course prerequisites.

Study-organizer strategies:

1. Become familiar with the criteria to assess credit for life experience so that you can encourage the worker where appropriate to apply for this credit.
2. Know which institutions have procedures to waive requirements and courses, and the individual at the institution to whom workers should be referred.
3. Know the variety of options to obtain credit for life experience (i.e., CLEP, challenge examinations, life experiences, etc.), and telephone for the worker to request further assistance.
4. Know what external degree programs are available and how to become admitted to these programs.

Obstacle 3--Not knowing where in the workplace to seek information and apply for tuition reimbursement.

Study-organizer strategies:

1. Publicize through union and company publications, special publications, meetings, and company bulletin boards information about the tuition refund program.
2. Become familiar with the procedures of the tuition refund program, and know whom to contact at the company to obtain more information or clarification.

*Adapted from Labor Education Center, Training Advisor's Manual. New Brunswick, N.J.: Rutgers University, Division of Continuing Education, 1979, p. 12.

Objective 8

Obstacle 4--Time-consuming and complicated tuition refund and educational admissions and enrollment procedures.

Study-organizer strategies:

1. Review the applications for admissions and tuition refund with the worker.
2. Help workers complete as much as possible of the admissions application and/or tuition refund application at the study-organizer center and answer any questions the worker may have or call a contact person.
3. Give the worker only those materials that are pertinent; don't overwhelm him or her with extra materials.

Obstacle 5--The lack of confidence in oneself as a student.

Study-organizer strategies:

1. Identify other workers who have succeeded, develop flyers about them, and have them speak to individuals or groups of workers about their experiences.
2. Have information ready to use about the advantages of being an adult when returning to education.

Obstacle 6--Previous bad experiences with school systems.

Study-organizer strategies:

1. Have local educators who understand and are sympathetic to the adult learner speak to workers individually and/or in groups to help them relate to education.
2. Know the local educational institutions that work with adults in a positive way.
3. Identify workers who have had bad experiences with school and then succeeded. Have them speak to workers considering going back to education.

Obstacle 7--The reluctance to enroll alone in a class.

Study-organizer strategies:

1. Know what courses and the time of day when it is more likely that adults will be enrolled.
2. Keep information on the intake form and review the forms to see whether another worker you have seen might want to enroll in a similar program or course. Get them together to enroll in the course.
3. See if there are peer-support groups offered by educational institutions and try to have the worker participate in the group.

Obstacle 8--Family pressures concerning continuing one's education.

Study-organizer strategies:

1. Determine what family attitudes might be toward returning to education. With the worker's permission, contact the spouse to explain the benefits of going back to school.
2. Help identify places that offer child care.
3. Find out from the spouse what problems there might be in returning to school and offer possible suggestions to overcome them.
4. Meet with the husband and wife to talk about the tuition refund program.
5. Encourage the worker to discuss his or her educational experiences with the family.

Obstacle 9--Not being able to organize one's time to meet all responsibilities.

Study-organizer strategies:

1. Work with the family and/or worker to help establish priorities.
2. Help to work out a schedule that provides time for work, household responsibilities, family activities, and study.

Obstacle 10--The failure to see how education can be helpful.

Study-organizer strategies:

1. Have information on how education has helped fellow workers either advance on the job or find another more satisfying job.
2. Help workers to set goals and relate how to obtain those that are appropriate to education.
3. Have the worker talk to others who have used educational opportunities to meet their needs.

Obstacle 11--The inability to make a long-term commitment to a course and/or program.

Study-organizer strategies:

1. Review course and program requirements and alternatives for interested workers.
2. Be prepared to suggest how to use a credit-by-examination program to substitute for standard classroom course work, where possible.
3. Counsel the worker on the number and sequence of course selection.
4. Emphasize the difference between short-term needs and long-range goals in terms of the worker's interest and involvement.
5. Help the worker to plan an educational program around the necessities of job, family, and career goals.

Objective 8

Obstacle 12--The feeling that they are too old to enroll in courses.

Study-organizer strategies:

1. Have information available to show the average age of students is 29 and that millions of adult workers are returning to school.
2. Point out the generally acknowledged fact that a worker entering the job market today can be expected to change jobs at least seven times during his or her adult working years with the accompanying need for retraining or new training for each change.
3. Stress the necessity for continuing education as a means of enhancing job security, promotion and transfers, and career options.

Obstacle 13--Not having the money to pay for tuition expenses in advance.

Study-organizer strategies:

1. Explain pros and cons of tuition refund financing.
2. Understand the financial obstacles when workers have to pay for the courses selected, complete such courses, and enroll in and pay for the courses selected for the next term before they are able to collect their tuition refund. Be prepared to offer them sound financial counseling on what do do.
3. Be a proponent of and work to implement an intermittent payment plan to help workers pay for their course work.
4. Be informed about and work to achieve a delayed tuition arrangement.
5. Arrange for loans through the school financial aid office, union or company credit union, or banks (especially for members covered by tuition refund).
6. For workers not covered under tuition refund, find out how they can apply for grants or scholarships through the school or the union.
7. Inform the worker that textbooks and equipment may be bought second hand. Textbooks may also be borrowed from the school or public library.

Obstacle 14--The difficulty for those who speak English as a second language to enroll in courses.

Study-organizer strategies:

1. Find out if courses are offered in the worker's native language.
2. If not, when a bilingual worker seems to lack skills in written or spoken comprehension of English (standard or technical), recommend enrolling in a course in English as a second language or Right to Read to insure success in technical courses or courses requiring a fairly advanced knowledge of English. Present this in such a manner that the worker does not feel criticized for lack of command of English.

3. Know who the bilingual educators are and how they can fit into the academic program. Refer bilingual workers to them for advising whenever possible to facilitate assimilation into educational programs.
4. Seek out the Adult Basic Education professional educators in the community to work with workers speaking a foreign language to ease their assimilation into educational programs.

Obstacle 15--The lack of space at home to complete class assignments. This is a real problem for workers with small houses or large families.

Study-organizer strategies:

1. Help the worker to set aside a time and place to study on a regular basis and develop a supportive routine to accomplish this.
2. Recommend doing homework at the school or library.
3. Suggest utilizing a weekend study program or course work, seminar, or independent study.

Obstacle 16--Facilities and educational institutional regulations that do not respond to adult learner needs.

Study-organizer strategies:

1. Urge educational institutions to schedule adult classes in rooms with tables and chairs rather than the standard armrest chairs, which adults equate with secondary school or lecture-oriented learning experiences.
2. Find out the purposes of institutional regulations that seem especially bothersome to adults and explain them to workers.
3. Try to have educational institutions adapt their regulations to meet the needs of adults.

Obstacle 17--Educational operational schedules that limit full services to workers.

Study-organizer strategies:

1. Know the evening and weekend hours of the counseling, admissions, registration, financial aid, and veterans offices. Give this schedule to the worker.
2. Try to find out if special evening and/or weekend information sessions would be offered by educational institutions. If so, inform workers about these special meetings.

Objective 8

Obstacle 18--A narrow definition of what constitutes a job-related course that is eligible for tuition refund.

Study-organizer strategies:

1. Meet with the management person responsible for administering the tuition refund program to review and possibly broaden the range of courses and programs that might qualify for tuition refund.
2. Develop a list of courses and programs that would qualify for tuition refund and give them to workers.

Obstacle 19--Supervisors and co-workers discouraging workers from "getting involved" again in formal education.

Study-organizer strategies:

1. Work with management to encourage supervisors to support the program.
2. Publicize the positive aspects of the program encouraging workers to be supportive of those who want to engage in education.

OBJECTIVE 9—Participants will become capable of setting up a study-organizer center.

Learner Outcomes

The participants will be able to:

- Describe the physical features of a study-organizer center
- Draw a layout of a study-organizer center
- List the furniture and materials needed for a study-organizer center
- Know how and where to obtain furniture and materials for a study-organizer center
- Develop a plan of tasks to be completed in establishing a study-organizer center

Number of Sessions

One

Instructional Techniques

Lecture, large and small group discussion, audiovisual

Location

Study-organizer center

Strategies and Activities

- Review with the participants an inventory of furniture and materials needed for a study-organizer center, and have the participants add any additional items.
- Review slides of actual career information centers and/or other study-organizer centers.
- Have the participants work in small groups to develop floor plans for the center. Then discuss those floor plans and develop the one to be used at this site.
- Have the participants in small groups develop a list of tasks to be completed in setting up the center. Then discuss these suggestions in a large group and develop a master list.

Suggestions for the Trainer

The session should be conducted at the site of the study-organizer center. This will enable the trainees to start to visualize how to set up the center and to think in terms of how the center would be operated. Much of the time should be devoted to having the participants work in small groups on the floor plan for the center and the tasks needed to complete the center. Union, education, company, and community representatives should be involved in this discussion. Some discussion will overlap into how the center will operate. While this should not be thwarted totally, the trainer has to be careful not to spend too much time on this topic which will be covered in the next session.

Handout Materials

- Inventory of Suggested Furniture and Equipment*

*Included in this volume.

Objective 9

Inventory of Suggested Furniture and Equipment

Table and chairs	Bulletin boards
Lounge chairs	Bookcase
Desk and chair	Display rack
File cabinet	Telephone

OBJECTIVE 10—Participants will know how to operate a study-organizer center.

Learner Outcomes

Participants will be able to:

- Develop the operational procedures for a study-organizer center
- Start up a study-organizer center

Number of Sessions

One to two

Instructional Techniques

Small and large group discussion, lecture, demonstration, audiovisual

Location

Study-organizer center

Strategies and Activities

- Have the trainees identify the daily activities of a study-organizer center, and list them on a flip chart, overhead projector, or chalkboard.
- Develop the operational procedures from the above discussion by planning how to write operational procedures and then having the participants work in pairs to write the operational procedures for the center.
- Develop a master list of operational procedures that will become the basis for the center's operational plan.

Suggestions for the Trainer

The trainer should use this session to simulate a day in the operation of the center. Try to estimate the average number of people likely to come to the center in the course of a workday. Discussion should include handling unusual situations, such as when the center is overcrowded or underutilized. The trainer should get the participants involved in mock demonstrations of how workers would use the center. This activity will help to emphasize the need to keep records and to follow up. Operational procedures for reaching the workers should focus on the periods of time before and after the shifts, and rest, personal, and lunch times.

Handout Materials

- Sample Study-Organizer Intake Form (see Objective 7, E)*
- Suggested Informational Materials for a Study-Organizer Center*
- Suggested Reference Books for a Study-Organizer Center*

*Included in this volume.

Objective 10

Suggested Informational Materials for a Study-Organizer Center

Catalogs, master schedules, and other literature from local postsecondary educational institutions

Applications for admission to local institutions

A map of the local geographic area pinpointing the postsecondary educational institutions

A list of contact people at the postsecondary institutions

A list of institutions with descriptions of ways to obtain credit for life experience

A list of apprenticeship programs in the local geographic area

Tuition refund contract language, brochures, and application forms

Company career information

List of potential courses eligible for tuition refund

Financial aid brochures and application forms

Veteran benefits brochures

Study-organizer center brochures

Study-organizer center posters

Suggested Reference Books for a Study-Organizer Center

American Council on Education, The National Guide to Credit Recommendations for Noncollegiate Courses. Washington, D.C.: American Council on Education, 1979.

Bolles, Richard N., What Color is Your Parachute? Berkeley, Calif.: Ten Speed Press, 1978.

College Scholarship Service of the College Board, Meeting College Costs. New York: College Entrance Examination Board, 1978. Order from College Board Publications Orders, Box 2815, Princeton, N.J. 08541. Free.

Crystal, John C., and Richard N. Bolles, Where Do I Go With My Life? Somers, Calif.: Seabury Press, 1974.

Don't Miss Out: The Ambitious Student's Guide to Scholarships and Loans. 1979. Order from Octameron Associates, P.O. Box 3437, Alexandria, Va. 22302. $2.25.

Feingold, Norman, and Marie Feingold, Scholarships, Fellowships and Loans, Vol. VI. 1977. Order from Bellman Publishing Company, P.O. Box 164, Arlington, Mass. 02174.

Flaugher, Ronald L., Credit by Examination for College Level Studies: An Annotated Bibliography. New York: College Entrance Examination Board, 1967.

Future Directions for a Learning Society and College Scholarship Service, Paying for Your Education: A Guide for Adult Learners. New York: College Entrance Examination Board, 1980. Order from: College Board Publication Orders, Box 2815, Princeton, N.J. 08541. $3.50 each; for 100-999 copies, $1.00 each; for 1,000-9,999 copies, $.75 each; for 10,000 or more copies, $.50 each.

Gordon, Linda W., and Judy H. Schub, On-Campus Degree Programs for Part-Time Students. Washington, D.C.: National University Extension Association, 1976.

Kay, Evelyn R., Directory of Postsecondary Schools with Occupational Programs, 1975-1976. Washington, D.C.: National Center for Education Statistics, 1977. (Or similar reference book.)

Lathrop, Richard., Who's Hiring Who? Berkeley, Calif.: Ten Speed Press, 1977.

Matheson, Maureen, editor, The College Handbook, 1979-80. 17th edition. New York: College Entrance Examination Board, 1979.

National Association of Trade and Technical Schools, Directory of Accredited Private Trade and Technical Schools. Washington, D.C.: National Association of Trade and Technical Schools, 1978.

National University Extension Association, Guide to Independent Study through Correspondence Instruction. Washington, D.C.: National University Extension Association, 1977.

Need a Lift? 1979. Order from The American Legion, National Emblem, P.O. Box 1055, Indianapolis, Ind. 46206. $1 each; for 100 or more copies $.75 each.

Prybylowsky, Audrey, "A Short-Cut through College." Adult Educator, Winter 1978, pp. 13, 16.

Schlachter, Gail Ann, Directory of Financial Aids for Women. 1978. Order from Reference Service Press, 9023 Alcott, Suite 201, Los Angeles, Calif. 90035.

Sosdian, Carol P., and Laure M. Sharp, Guide to Undergraduate External Degree Programs in the United States. Washington, D.C.: National Institute of Education, 1977.

Objective 10

UAW Tuition Refund Program. UAW Publication 404. Order from UAW Education Department, 8000 East Jefferson Avenue, Detroit, Mich. 48214. 100 copies for $15. [Note: This booklet includes a comprehensive list of questions most commonly asked by workers about the UAW Tuition Refund Program.]

U.S. Department of Labor, Dictionary of Occupational Titles. Washington, D.C.: U.S. Department of Labor, 1977.

U.S. Department of Labor, Bureau of Labor Statistics, Occupational Outlook Handbook. Washington, D.C.: U.S. Department of Labor, 1978. Issued biannually.

OBJECTIVE 11—Participants will know how to make workers aware of educational opportunities available to them.

Learner Outcomes

Participants will be able to:

- Use their understanding of the barriers to worker participation in education to develop promotional strategies to increase participation
- Collect information from workers to help determine effective methods to reach workers
- Develop and implement a plan to publicize educational opportunities available to workers

Number of Sessions

One to two

Instructional Techniques

Lecture, large and small group discussion

Location

Training site

Strategies and Activities

- The trainer should review national, regional, and local surveys that analyze effective ways to reach workers. Have the trainees work in small groups to devise strategies to reach workers that would be effective in their workplace.
- In a large group, discuss the possible strategies to reach workers, listing them, and then reviewing the ways to collect information from workers to help confirm these strategies.
- Discuss how the workplace communication system (grapevine) operates and can be effective in getting the word to workers. Use the handout "Where Are the 'Communicators'?" to have the trainees identify the locations at their workplace of the in-plant communicators.
- Have the group determine the immediate and long-term strategies to be used to reach workers. List them, and then decide when and how they will be implemented in the study-organizer program.

Suggestions for the Trainers

Developing the strategies and operational plan to reach workers should be the most important outcome of this meeting. The workplace grapevine is one of the most effective ways to get the word out to workers and should definitely be incorporated in this plan. The principles of the grapevine are basically the same, but the physical location and the in-plant communicators may vary by job classification or assignment. Therefore, it is important, in this session, to have the trainees identify the in-plant communication system (the grapevine) in their workplace.

Objective 11

Trainees should also be taught to collect information on the intake form about how the workers found out about the program and their interests. They should use the answers to determine what methods are working best to reach workers and meet their needs.

Handout Materials

- Strategies to Overcome Obstacles to Worker Participation in Education* (see Objective 8)
- Where Are the "Communicators"?*
- Reaching Workers to Increase Participation in Education*
- Communications Channels for the Study-Organizer Program*

References

Arbeiter, Solomon, Carol B. Aslanian, Frances A. Schmerbeck, and Henry M. Brickell, 40 Million Americans in Career Transition. New York: College Entrance Examination Board, 1978.

Chudy, David., Western New York, UAW General Motors Tuition Refund Survey: A Descriptive Report. Buffalo, N.Y.: UAW, 1979.

*Included in this volume.

Where Are the "Communicators"?

<table>
<tr><td>STEEL
STORAGE

**Water fountain</td><td colspan="2">LATHES

SHAPERS

MILLS</td><td>GRINDERS
* REPAIR
* MAINTENANCE</td></tr>
<tr><td>* SHIPPING
**Vending Machine</td><td></td><td>CUTTER
GRINDERS</td><td>OFFICE</td></tr>
<tr><td>WELD

SHOP</td><td rowspan="2">ASSEMBLY

Union Work Centers</td><td>*TOTAL CRIB</td><td rowspan="2">BORING

MILLS</td></tr>
<tr><td>* CAFETERIA</td><td></td></tr>
</table>

*Location of key communicators
**Communication location in all plants

What Does the Facility You Work In Look Like?

Objective 11

Reaching Workers to Increase Participation in Education

In a sense the workers represent a captive audience in that they are all at the workplace and within reach of the study organizer. Despite union efforts, very few members are as yet aware of the possibilities of the tuition refund program and adult education as it relates to their lives and career opportunities. The purpose of the study-organizer program is to get their interest, make them aware, and get them involved in the educational opportunities available through participation in the tuition refund program. The following are suggested ways to achieve these goals. They are not necessarily in order since the sequence will vary from one location to another.

1. Make the local union members aware of the study-organizer center program through the media of the regular and special local union membership meetings.
2. Have the local union education committee make a presentation to the members at such meetings.
3. Invite the postsecondary institution representatives who are involved in this program to the union hall to speak to the membership about the program. Allow sufficient time on the agenda for these representatives to answer questions about the program.
4. Have sufficient quantities of application forms for both tuition refund and postsecondary enrollment available at the union meeting to enroll members on the spot, if possible.
5. There should be single-page "flyers" explaining the study-organizer center and its program for mass, plant-gate distribution.
6. The local shop paper, if there is one, should have information and publicity concerning the total program, as a service to its members. (In some local unions, the shop paper is usually mailed out to the members each month; in other instances, it is distributed each month at the plant gates, usually at the start of the shift on the date of distribution.)
7. Union in-plant bulletin boards should have descriptive literature about the program. This material should have the following characteristics:
    - Colorful.
    - Sequential and changed completely throughout the plant or workplace on a regular basis to counteract the negative impact of "surface attention"--becoming so visually used to seeing something that after a while it no longer attracts one's attention.
    - Sparse in printed content--but factual.
    - Contain a reference for further information; e.g., the study organizers and how to contact them and when.
    - Small enough to fit the union bulletin boards. The local union uses their in-plant bulletin boards to post not just one, but several important notices to its members of its various and

ongoing activities on a regular basis, and the bulletin board size is often regulated by management to keep the union's in-plant communications capabilities to a minimum. Study-organizer notices and tuition refund notices should be planned with these constraints in mind.

Recruiting is a continuing and vital part of this program. It involves several related but autonomous factors that have been described here.

Objective 11

Communications Channels for the Study-Organizer Program

There are essentially four channels for communicating information about the study-organizer program. These channels represent the organizations and their suborganizations around which this program as a whole evolves.

1. The union channel of communication
   a. The international union is the organization where official recognition and authorization of the program begins. Communications capabilities at this level include the education department staff and a wide array of experience, know-how and articulation with other union organizations, postsecondary institutions, and community organizations.
   b. The local union or unions in the selected geographic area are where the communications methods, policies, and programs are actually implemented. Membership meetings provide a forum for face-to-face communications, and the success of the program here is vital to the extension of communications to the workplace where the total work force can be reached with the following:
      (1) Official correspondence--letters, postcards, stapled brochures, and other literature bearing the return address of the local union and mailed directly to the workers' homes.
      (2) Handbills or flyers designed to be distributed at the plant gates when the workers report at the beginning or end of their shifts.
      (3) Cards, brochures, and other small pieces of literature describing the program that can be brought into the work place by the local union's steward committee, executive board, or key activists who can effect a plantwide distribution, if possible.
      (4) The personal contact of the steward committee, executive board members, standing committees (the local union education committee, etc.), and other local union activists who can be depended upon to assist in such activities.
      (5) The local union bulletin boards, where selected descriptive posters provide the workers with a permanent communications base for keeping abreast of their local union's activities.

2. The company channel of communication
   a. Having once endorsed the study-organizer program, the company has its own bulletin boards in the plant where notices about the program and tuition refund can be posted.
   b. The personnel department representative of the company assigned to cooperate and coordinate with the local union can also communicate with the workers about the program.

3. The educational institution channel of communication
   a. It is essential for the program to have supplies of catalogs, course bulletins, and other literature descriptive of educational institutions.
   b. An educational institution can also be of immense help by providing expertise in designing and producing union-based literature about this program.

4. The community institutions and organizations channel of communication
   a. The newsletters and bulletin boards of community service and religious organizations and libraries can be used to publicize the program.
   b. Community informational telephone answering services should be provided with particulars about the program and who can be contacted for more information.